

# **Community Spirit Program Donation Grant**

## ***Guidelines***

**Application Deadline: December 31**

*Funded by the Government of Alberta through the Alberta Lottery Fund in order to build strong communities and enhance the quality of life for Albertans.*



**Government  
of Alberta ■**

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## **BACKGROUND ON THE COMMUNITY SPIRIT PROGRAM**

The goal of the Community Spirit Program (CSP) is to increase individual charitable giving to help support Alberta's nonprofit and charitable organizations. The program is donor-driven, meaning it recognizes and encourages Albertans to make cash donations. Monies received from Albertans stay in Alberta to support Alberta-based nonprofit and charitable organizations. The following financial incentives are available for individual donors and recipient organizations.

### **Charitable Tax Credit**

- § Effective January 2007, the Alberta tax credit for eligible charitable donations that exceed \$200 in a tax year has increased from 12.75 per cent to 21 per cent of the amount donated.
- § When added to the federal tax credit of 29 per cent, this gives Albertans a 50 per cent **tax credit** on those donations - one of the highest charitable tax credits in Canada.
- § The first \$200 in eligible charitable donations made in a tax year continues to receive a federal tax credit of 15 per cent and an Alberta tax credit of 10 per cent.
- § **NOTE:** Further information is available online at [www.communityspiritprogram.ca](http://www.communityspiritprogram.ca) by accessing the Toolkit link.

### **Donation Grant**

- § The grant was launched in April 2008 and is supported by funding from the Alberta Lottery Fund.
- § The intent of this grant is to partner with individual Albertans who donate monies to eligible nonprofit organizations by providing those organizations with a proportional grant based on the amount of eligible cash donations received.
- § The grant is available to nonprofit organizations and Canada Revenue Agency (CRA) registered charities that are incorporated and/or registered in Alberta and operating for a minimum of one year. Organizations must provide philanthropic services to Albertans (refer to Section 1.0).
- § Philanthropic services include activities in Alberta that support education, health, social services, programs for seniors, the environment, animal welfare, sports and recreation, arts and culture, heritage, parks, or agriculture, etc.
- § Organizations that limit their activities to their own members or who operate only to benefit those in other provinces or other countries do not qualify.
- § Grant monies can be used to help fund any part of an organization's operating costs, program costs and/or capital projects.
- § The amount of the grant will vary from year to year and is subject to a maximum of \$25,000 per year up to a maximum of \$50,000 over three years.

## 1.0 Eligibility

To be eligible, an organization must be **one** of the following:

§ A nonprofit organization that is:

- incorporated and/or registered in Alberta and operating for a minimum of one year; and
- in good standing under applicable legislation outlined below.

**and/or:**

§ A Canada Revenue Agency (CRA) registered charity\*\* that is:

- incorporated and/or registered in Alberta and operating for a minimum of one year; and
- in good standing with the Canada Revenue Agency.

### Legislation

Organizations must be operating under **one** of the following Acts:

§ *Societies Act\**

§ *Libraries Act*

§ *Agricultural Societies Act\**

§ Part 9 of the *Companies Act* (companies with objectives other than acquisition of gain)\*

§ Part 21 of the *Business Corporations Act* (extra-provincial corporations formed outside Alberta that conduct business in Alberta; must have objectives other than the acquisition of gain)\*

§ *Cemeteries Act* or *Cemetery Companies Act*

§ Foundations established under and regulated by the *Post-Secondary Learning Act*

§ Foundations established under and regulated by the *Regional Health Authorities Act*

§ Management bodies established under the *Alberta Housing Act*

§ Special act of the Alberta Legislature

§ Special act of the Parliament of Canada (e.g. Service Clubs, Legions)

§ *Canada Corporation Act - Part II*

#### NOTE:

\* **Corporate Registry number** - The provincial corporate registry number should be a 9 or 10 digit number beginning with the number '5'. If you do not know the number, please contact a Registry Agent in your community. The Registry Agent listing can be found at: <http://servicealberta.ca/1641.cfm>. There may be a charge for this service.

\*\* **Charitable Registration Number** - Once a charity is registered with the Canada Revenue Agency, a charitable registration number is issued allowing the organization to issue official income tax receipts for income tax purposes. **This number consists of 15 digits.** If you do not know your CRA-registered charity number, visit Charities Information at [www.cra.gc.ca/charities](http://www.cra.gc.ca/charities) or contact Client Services at 1-800-267-2384 or 1-800-892-5667.

## 1.1 Ineligible Organizations

- § Organizations not incorporated, registered or operating in Alberta.
- § Organizations that have been incorporated in Alberta for less than one (1) year.
- 
- § Organizations that have not received a minimum total of \$1,000 in eligible cash donations from Albertans over a 12-month fiscal period (refer to Section 2.1 for information on combining up to **three** consecutive 12-month fiscal periods).
- § Municipalities (city, town, village, municipal district, specialized municipality, summer village or town under the *Park Towns Act*).
- § Faith-based organizations that do not provide philanthropic community programs and/or services to the broader community.
- § Organizations with a sole mandate (100%) to provide programs and services outside of Alberta.
- 
- § Organizations that have overdue financial or project reports for previous Government of Alberta grants.

## 1.2 Faith-based Organizations

- § Faith-based organizations qualify to apply for a grant only if they provide philanthropic community programs and/or services to persons outside their own faith community.
- § These programs and/or services need to be clearly defined in the 'Statement of Purpose' as well as identified in the financial statement.
- § Tithing/offering dollars that are designated specifically to philanthropic community programs and/or services are eligible cash donations.
- § Tithing/offering dollars that are intended to support congregational needs such as staff salaries, general church operations/upkeep, facility upgrades, etc., are not eligible cash donations.
- § Special provisions exist with respect to calculating the portion of donations received by faith-based organizations that may be considered for purposes of this program. This can be reviewed with program staff.

## 1.3 National/International Organizations

- § Organizations with a primary mandate to provide national or international services qualify to apply for a grant only if they provide philanthropic community programs and/or services to Albertans.
- § These programs and/or services need to be clearly defined in the 'Statement of Purpose' as well as identified in the financial statement.
- § Only cash donations made by Albertans in support of programs in Alberta will be eligible.
- § Special provisions exist with respect to calculating the portion of donations received by national/international organizations that may be considered for purposes of this program. This can be reviewed with program staff.

## 1.4 National Organizations Duly Registered in Alberta

- § Only cash donations made by Albertans can be included as eligible cash donations on the calculation worksheet.
- § Where an organization has revenue (including donations) from multiple provinces, the **Alberta** portion of revenue and cash donations must be identified separately from the total annual revenue when completing the calculation worksheet. This can be accomplished by submitting an additional detailed sheet outlining revenues received in Alberta only.

## 2.0 Eligible Cash Donations - General Requirements (see 3.0 and 3.1 for further details)

- § Cash donations include currency/coins, negotiable money orders, cheques, debit card and/or credit card transactions.
- § **A minimum total of \$1,000 in eligible cash donations from individual Albertans** must be received by an eligible organization in its most recent completed 12-month fiscal period in order to apply for a grant (refer to Section 2.1).
- § Multiple 12-month fiscal periods where an organization reaches \$1,000 cannot be combined.
- § This 12-month fiscal period corresponds with the organization's most recent completed year-end financial statement (e.g. January 1 - December 31; April 1 - March 31; September 1 - August 31).

### 2.1 Minimum \$1,000 Not Reached

- § If an organization did not receive the minimum \$1,000 required **in its most recent completed 12-month fiscal period**, there is an option to combine up to three consecutive 12-month fiscal periods (donations received prior to January 1, 2007 are not eligible) to reach the required \$1,000 minimum.
- § If the organization chooses to combine two or three consecutive 12-month fiscal periods, a multiple-year calculation worksheet must be completed. This worksheet is available on the program website.
- § **Example 1** - Combining two years:
  - Organization XYZ received \$500 in its most recent completed 12-month fiscal period (September 1, 2010 - August 31, 2011) and cannot apply because it did not reach the required total of \$1,000.
  - The organization received \$600 in the previous completed 12-month fiscal period (September 1, 2009 - August 31, 2010).
  - The organization can now apply to the program by combining  $\$600 + \$500 = \$1,100$  from the two consecutive 12-month fiscal periods (2009-10 and 2010-11).
  - The appropriate calculation worksheet combining the two years must be completed, and the two consecutive 12-month financial statements used in the calculation worksheet must be submitted (2009-10 and 2010-11).
- § **Example 2** - Combining three years:
  - Organization XYZ received \$300 in its most recent completed 12-month fiscal period (September 1, 2010 - August 31, 2011) and cannot apply because it did not reach the required total of \$1,000.
  - The organization received \$400 in the previous completed 12-month fiscal period (September 1, 2009 - August 31, 2010) and still cannot apply as it has not reached the required minimum total of \$1,000.
  - The organization reviews its next previous completed 12-month fiscal period (September 1, 2008 - August 31, 2009). It received a total of \$500 in February 2007.
  - It is now eligible to apply by combining  $\$300 + \$400 + \$500 = \$1,200$  from the three consecutive 12-month fiscal periods (2008-09, 2009-10 and 2010-11).
  - The appropriate calculation worksheet combining the three years must be completed, and three consecutive 12-month financial statements used in the calculation worksheet must be submitted (2008-09, 2009-10, and 2010-11).

§ **Example 3** - Previous year is over \$1000:

- Organization XYZ received \$700 in its most recent completed 12-month fiscal period (September 1, 2010 - August 31, 2011) and cannot apply because it did not reach the required total of \$1,000.
- The organization received \$1,200 in the previous completed 12-month fiscal period (September 1, 2009 - August 31, 2010) and did not apply for a donation grant in the 2010-11 grant cycle.
- The organization may apply using the funds received in its previous year, but cannot combine that amount with the most recent year since the minimum \$1,000 donation was reached in one completed fiscal period.
- The organization can hold onto the donations received in the most recent fiscal year and possibly combine that total with the following year's total if the minimum required is not reached at that time.

## 2.2 Verification Requirements

§ Confirmation of eligible cash donations should be clearly identified on financial documents submitted with the application. Example: Cash donations - individuals - \$5,000.

§ **Copies of official income tax receipts or counter receipts are not required.**

§ **Do not send information containing personal donor names and/or addresses.**

§ Details of eligible cash donations must be available for audit purposes.

§ **HINT:** A detailed list providing the date and amount of individual cash donations helps program staff review and verify applications quickly.

### **Example:**

Donor #1	\$50	March 20, 2009
Donor #2	\$100	September 5, 2009
Donor #3	\$150	November 30, 2009

### 3.0 Eligible Cash Donations (examples provided are not inclusive)

- § **A-thons** - cash donations made through personal pledges in support of swim-a-thons, bike-a-thons, walk-a-thons, etc.
- § **Casino/bingo donations** - if an individual wins and wishes to make a cash donation to the host nonprofit or charitable organization, this is an eligible cash donation (refer to Section 3.1).
- § **Court-ordered payments** - dollars received when individuals are ordered by the court to pay a debt to society - includes cash donations received directly by an eligible organization or cash donations received through a law office and redirected to the eligible organization.
- § **Donation boxes/donation jars** - where individuals voluntarily drop in cash donations (museums, libraries, Christmas kettles, events). Donations must be accounted for in bank records.
- § **Employee donations** - matched by an employer - only the portion donated by the 'employee'.
- § **Endowment fund or scholarship** - donations in support of an endowment fund or scholarship in Alberta.
- § **Event sponsorship** - cash donations by an individual who wishes to sponsor an event (swim race, barrel race, bricks). The name of the individual may appear in a program, on a brick or on a swim medal. If there is no personal benefit to the individual, this is an eligible cash donation.
- § **Faith-based cash donations** - received and used for philanthropic community programs and/or services (food bank, community meeting space; refer to Section 1.3).
- § **Flow-through donations**, such as:
  - United Way `donor choice' donations (tax-receipted by United Way);
  - CanadaHelps online donation link (tax-receipted by CanadaHelps);
  - Community Foundation donations from an individual that are directed to a specific organization (not interest earned);
  - Cash donations `held in trust' by another entity (municipality, school board); and
  - Funds received from another nonprofit or charitable organization that were clearly collected on your organization's behalf.
  - Cash donations collected by grocery stores through either coin boxes or a specified dollar value that is voluntarily added to an individual's grocery bill. The grocery store issues a cheque to the recipient nonprofit or charitable organization.
- § **Funds raised on behalf of a nonprofit organization:**

**Example 1:** Christmas Fund selects eight nonprofit organizations to support. Individuals donate to the Christmas Fund and their donations are sent to the selected organizations.

**Example 2:** A business holds an event and advertises that invited guests are encouraged to donate to support two or three selected nonprofit organizations. The company holds the funds received 'in trust' and provides 100% of the proceeds to the selected organizations.

### 3.0 Eligible Cash Donations - Continued (examples provided are not inclusive)

- § **In lieu of volunteer time** - cash donations received in lieu of volunteering time, such as a volunteer who is asked to work at a bingo or casino. The volunteer indicates he/she cannot work at the bingo or casino, but voluntarily makes a suggested donation of \$100 instead.
- § **In-Memoriam** - donations made 'in memory of' or 'in honour' of an individual who has passed away (wills or donations made at a funeral).
- § **Individual** donations of cash from Albertans.
- § **Net proceeds from telemarketing or contracted fundraising efforts** (third-party commission based fundraising). An organization contracts with a telemarketing firm. The telemarketing firm raises \$50,000 on behalf of the nonprofit or charitable organization. Along with the proceeds, the organization receives an invoice in the amount of \$15,000 for the services provided. The **net proceeds of \$35,000** are considered eligible cash donations.
- § **Optional parent fees** - if a nonprofit organization (sports or arts group, childcare agency) charges monthly or annual fees for its programs and services, but has an 'optional' add-on non-mandatory charge of \$20/year, only the \$20 amount is considered an eligible cash donation.
- § **Out-of-pocket expenses** - when a volunteer is reimbursed for expenses incurred on behalf of the nonprofit or charitable organization (mileage, meals) and voluntarily donates the funds back. Transactions must be recorded in the organization's financial records. For further information, visit the Canada Revenue Agency website at [www.cra.gc.ca](http://www.cra.gc.ca) or call 1-800-267-2384 toll-free.
- § **Special event ticket (CRA)** - the net portion of a special event ticket (golf tournaments, auctions, silent auctions/sales, social events) that is eligible for an official income tax receipt. For further information, visit the Canada Revenue Agency website at [www.cra.gc.ca](http://www.cra.gc.ca) or call 1-800-267-2384 toll-free.
- § **Special event ticket (non-CRA)** - a nonprofit organization that cannot issue an official income tax receipt may claim a portion of a special event ticket if it is clearly stated on the special event ticket that "a portion of this ticket is considered to be a cash donation." The amount that is considered a cash donation must be clearly stated. The ticket must be purchased by an individual, not a business or corporation. **NOTE: This amount cannot be claimed on an individual's annual federal income tax return.**
- § **Silent/live auction (CRA)** - the eligible cash donation is equal to the official income tax receipt the CRA-registered charity issues to the purchaser of the 'silent/live auction' item. For further information, visit the Canada Revenue Agency website at [www.cra.gc.ca](http://www.cra.gc.ca) or call 1-800-267-2384 toll-free.
- § **Silent/live auction (non-CRA)** - applies only to items that have a clearly stated 'suggested retail cost'. An individual successfully bids over the stated retail cost. The item has a retail cost of \$100, and is sold at the silent auction for \$300. The difference of \$200 is considered to be an eligible cash donation. The organization must keep detailed records of the item, suggested retail cost, and winning bid amount. The individual could receive a 'counter receipt' (**not an official income tax receipt**) for the cash amount over the stated retail cost.

**NOTE: All donations received must be clearly and accurately accounted for on the relevant 12-month financial statement(s) and available upon an audit.**

### 3.1 Ineligible Cash Donations (examples provided are not inclusive)

- § **Accrued cash donations** - money donated in a previous 12-month fiscal period, but recorded on financial statements in future years.
- § **Business or corporate sponsorships or donations** - from small businesses, large corporations, accountants, doctors, law firms, dentists, farm accounts.
- § **Commercial/business activities** - revenue received from thrift shops.
- § **Donations/gifts-in-kind** - land, meat, grass, volunteer hours, supplies, services, 'silent auction' items, credit card points, such as Aeroplan points and Airmiles.
- § **Donations received for non-Alberta based activities/projects** - including travel out of or into Alberta, as well as donations received specifically for national/international purposes (aid, construction, scholarships, endowments)
- § **Employer-matched donations** - Telus, Encana (refer to Section 3.0).
- § **Endowment/Foundation funds** - interest earned and disbursed.
- § **Faith-based donations** - for congregational needs (staff salaries, general church operations/upkeep, facility upgrades).
- § **Gift certificates/gift cards/coupons/loyalty programs** - grocery, Entertainment Books, gas, Canadian Tire money.
- § **Government funding** - municipal, provincial, or federal; funding from other lottery-funded foundations/agencies.
- § **Interest** - earned from GICs, bank accounts.
- § **Membership/Registration fees.**
- § **Non-government grants or funds received from other nonprofits** - Community Foundations, United Way, Private Foundations, Service Clubs, churches. 'Flow-through' donations are eligible (refer to Section 3.0).
- § **Outside Alberta donations** - cash donations received from individuals outside of Alberta.
- § **Revenue from fundraising** - lotteries, casinos, bingos, raffles, bottle drives, bake/book sales.
- § **Revenue from 'special events' fundraising** - golf tournaments (including mulligan sales), auctions, silent auctions/sales, social events. This refers to the cost of a 'special event' ticket that is not eligible for either an official income tax receipt or a counter receipt (refer to Section 3.0).
- § **Security/stock donations** (certificates) - life insurance policies, RRSPs, RRIFs, union dues, Airmiles.
- § **Telemarketing/contract fees** (third-party commission based fundraising) - fees charged as a result of fundraising efforts. The organization contracts with a telemarketing firm. The telemarketing firm raises \$50,000 on behalf of the non-profit or charitable organization. Along with the proceeds, the organization receives an invoice in the amount of \$15,000 for the services provided. The \$15,000 fee is considered ineligible.

## 4.0 Eligible Use of the Grant

The grant may be used to support the following (examples provided are not inclusive):

- § Operations (rent, utilities, insurance, salaries/wages, audit costs, general supplies and services, website).
- § Programs (costs associated with providing programs and/or services, including required supplies for those programs and/or services).
- § Capital projects (building maintenance, equipment purchases/upgrades, purchase of tools, purchase of or repairs to vehicles).
- § Other (endowment fund, scholarships to study in Alberta, research carried out in Alberta).

## 4.1 Ineligible Use of the Grant

The grant cannot be used for the following purposes (examples provided are not inclusive):

- § Activities and projects outside Alberta (humanitarian assistance to underprivileged countries, travel outside or into Alberta, out-of-province research, programs administered in other provinces; refer to Sections 1.3 and 3.1).
- § Leveraging against a grant from the Community Initiative Program (CIP) or the Community Facility Enhancement Program (CFEP).
- § Religious purposes (congregation-specific improvements/enhancements to the sanctuary and/or congregational worship activities, staff salaries; refer to Sections 1.2 and 3.1).
- § Commercial or for-profit purposes.
- § Political or lobbying activities - includes organized/registered political organizations.

## 5.0 Grant Agreement

- § For postmarked or hand-delivered applications, a signed **Grant Agreement** must accompany the grant application. This agreement must be signed by an officer of the organization with legal signing authority declaring all information contained in the application to be true and accurate. By signing the agreement, the organization agrees to the terms and conditions of the grant.
- § For online submissions, an electronic grant agreement is included in the application.

## 6.0 Freedom of Information and Protection of Privacy Act (FOIP)

- § All information provided by the organization in the grant application will be subject to the access to information provisions of the *FOIP Act*. Alberta Culture and Community Spirit may disclose the information, subject to any applicable exceptions to disclosure under the Act, in response to an access to information request.
- § The personal information that is provided in the grant application is required for the administration of the Community Spirit Program. It is collected under the authority of the *Community Development Grants Regulation* (see Glossary on program website for explanation) pursuant to the *Government Organization Act* and section 33(c) of the *FOIP Act*. It is protected by the privacy provisions of the *FOIP Act*. If you have any questions about the collection or use of this personal information, contact the Community Spirit Program administration office by e-mail at [community.spirit@gov.ab.ca](mailto:community.spirit@gov.ab.ca) or call 780-644-8604, toll-free by dialing 310-0000.

## 7.0 Application Process - How to Access Application

- § **Online System** - To become an online user, go to the program website ([www.communityspiritprogram.ca](http://www.communityspiritprogram.ca)) and click on the User ID and Password setup link. Once you have an online User ID and password, proceed to the Grant Management System by following the links on the program website. If your organization used the online system previously, an authorized user can proceed directly to the links on the program website. For maximum program support, organizations are encouraged to begin the application process as soon as possible.
- § **Downloadable form** - The application can be downloaded using Adobe Reader from the program website ([www.communityspiritprogram.ca](http://www.communityspiritprogram.ca)).
- § **Printed Copy** - For a printed copy of the guidelines and application, call 780-644-8604 (toll-free by first dialing 310-0000).

## 7.1 Application Requirements

### **Applicants must complete and submit an application form with the following information:**

- § The full incorporated (legal) name of the organization, the common name of the organization, the incorporation/registration numbers, registration dates, names, titles and phone numbers of key contacts, and the voluntary sector represented.
- § A completed Calculation Worksheet detailing how the amount of eligible cash donations from individual Albertans has been calculated for the most recent 12-month fiscal period or a combination of up to three consecutive 12-month fiscal periods. See worksheet explanation samples provided on the program website.  
  
**NOTE:** The 12-month fiscal period corresponds to the organization's most recent year-end financial statement. **Example:** If your fiscal year is September 1, 2010 - August 31, 2011, the financial statement needs to match this time period.  
**NOTE:** If an organization is combining two or three consecutive 12-month fiscal periods, fill in either two columns or three columns on the calculation worksheet.
- § A 'Statement of Purpose' outlining how the organization plans to use the grant (operations, programs and/or capital projects).
- § A copy of the organization's most recent completed 12-month financial statement(s) (audited, notice to reader, or unaudited). If the financial statement is unaudited, the information submitted must be signed by **two officials** of the organization, one being the Treasurer and another member of the organization with signing authority.
- § If the organization is combining two or three consecutive 12-month fiscal periods, the appropriate copies of the financial statements used in the calculation worksheet must be submitted.
- § A completed **Grant Agreement** signed by an officer of the organization with legal signing authority declaring all information contained in the application to be true and accurate. By signing the agreement, the organization agrees to the terms and conditions of the grant.
- § The **Grant Agreement** must be submitted in its original form and post-marked or hand-delivered by end of day **December 31**. For online submissions, an electronic grant agreement is included in the application.

**NOTE: Incomplete applications will not be accepted**

## 7.2 Submission of Application

There are **two methods** to submit an application:

- § **Online** - Refer to Section 7.0 for instructions on how to access the online system. As a registrant, access the online application by clicking on the link on the program website - [www.communityspiritprogram.ca](http://www.communityspiritprogram.ca)
- Detailed instructions for completing the online application are available on the program website.
  - Electronic financial documents can be attached in the application.
  - **ONLY** an individual with legal signing authority can complete the Grant Agreement and submit the application. By signing this agreement, the organization agrees to the terms and conditions of the grant. An additional registrant may prepare application materials; however, they cannot submit the application.
  - Make a copy of the application before clicking the 'submit' button.
  - Once the application is submitted, a notification is automatically sent to the applicant indicating it was successfully submitted.

**Documents must be completed online by end of day December 31.** If the deadline falls on a statutory holiday or weekend, the deadline will be extended to the end of the next business day.

**NOTE:** If the organization used the online system previously, an authorized registrant can proceed directly to the links on the program website.

- § **Mail or hand-deliver** - Provide one completed and signed application, along with the required financial documents to the mailing address below. **The documents must be post-marked or delivered by end of day December 31.** If the deadline date falls on a statutory holiday or weekend, the deadline will be extended to the end of the next business day.

- It is recommended that a tracking system be used when mailing applications (via post office or courier). The Government of Alberta is not responsible if the application or supporting documents are lost or not received.

- § Due to the anticipated volume of applications, organizations are encouraged to submit their application as early as possible.

- § **Faxed, emailed or incomplete applications will not be accepted. Do not** send additional information - annual report, photographs, newsletters, brochures, etc. Staple or clip applications. Do not use folders, coil bound folders, paper covers or binders.

### Mailing address:

**Community Spirit Program  
Alberta Culture and Community Spirit  
9th Floor, Standard Life Centre  
10405 Jasper Avenue  
Edmonton, AB T5J 4R7**

### Inquiries:

**Telephone: 780-644-8604,  
toll-free by dialing 310-0000  
E-mail: [community.spirit@gov.ab.ca](mailto:community.spirit@gov.ab.ca)  
Website: [communityspiritprogram.ca](http://communityspiritprogram.ca)**

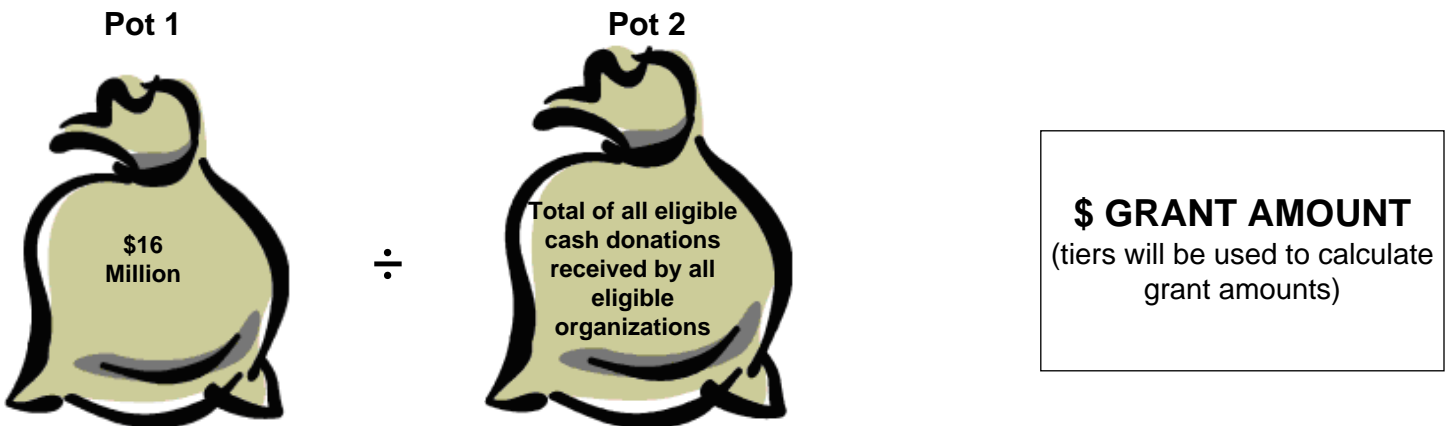
**KEEP A COPY OF THE APPLICATION FOR YOUR RECORDS**

## 8.0 Post Application Deadline - Review of Applications

- § Following the December 31 deadline, applications will be reviewed between January and March to ensure they are complete and meet the criteria as outlined in the program guidelines.
- § If required, key contacts listed on the application may be contacted between January and March and asked to provide additional information. One of the key contacts should be able to respond to financial questions.
- § **Ensure both contacts have a copy of the application and supporting documents.**
- § **NOTE: If an organization wishes to withdraw their application, they must do so by contacting the program office prior to January 31 following the grant deadline.**

## 9.0 Awarding of Grant

- § The grant calculation is done after all applications have been reviewed.
- § Using the program's available funds in **Pot 1** (\$16 million less administration costs), a financial calculation is done using the grand total of all eligible cash donations received by all eligible organizations (**Pot 2**) as reported in their grant application. As the value of the donation amounts will change each year, this means the total value in **Pot 2** will also change.



- § Rolling Three Years - Grants are calculated on a three-year cycle. The grant values of the applicant's previous two years are considered when determining the eligible amount of the grant for the third year.
- § The grant is subject to a maximum of \$25,000 per annum up to a maximum of \$50,000 over three years.
- § **Following final grant approvals by the Minister, applicants will be informed in writing within 120 days of the deadline date whether the application has been approved or declined.** An explanation will be provided for declined applications.

## 9.1 Grant Payment Options

- § Following the receipt of the grant approval letter a payment will be issued to your organization. This usually occurs in early May. There are two options available:
  - § **Direct Deposit - Electronic funds transfer (EFT)** - This is our preferred payment method as it is safe and efficient. It allows organizations to have their grant funds deposited electronically to their bank account. When payment is made by EFT, your organization will receive an EFT Remittance Statement by mail.
    - To be setup with an EFT payment, enclose a VOID cheque from your organization. For online users, a VOID cheque may be scanned and uploaded on the electronic "Attachments" page.
  - § **Cheque** - payment is issued as a cheque and is mailed to your organization.

## 10.0 Responsibilities of the Grant Recipient - Banking and Financial Records

- § The recipient organization must maintain adequate financial records to provide an accounting of spending and to show compliance with conditions of the grant. NOTE: A separate bank account is not required for the grant funds, as long as the funds and the use of the funds can be accounted for.
- § Upon request, the grant recipient shall provide the Government of Alberta and/or auditors of the Government of Alberta access to all financial statements, documents and all records pertaining to its grant funding.
- § Organizations will be responsible for maintaining records for audit purposes for a period of seven (7) years following receipt of a grant cheque.

## 11.0 Final Report

- § After an organization receives a grant, a final report outlining how the grant was **spent** must be submitted by **May 1 of the following year**. When submitting the final report, if the grant funds are committed for a future purpose (capital project), ensure significant detail and/or documentation is provided to support this.
- § The final report can be submitted using the online system. Refer to section 7.0 for instructions.

## 11.1 Use of Grant - Amendment

- § If the organization wishes to amend or change the stated 'purpose' of the grant, they must provide an explanation in writing to the program office. The letter must be signed by an officer of the organization with legal signing authority. The amendment will be reviewed and acknowledged by the program office and placed on file. The amendment must be noted in the organization's final report.

## 11.2 Key Points to Remember when Completing the Final Report

- § Refer back to the originally submitted application to review the Statement of Purpose.
- § A breakdown of how the grant funds were **spent** needs to be provided.
- § A signed Declaration must accompany the final report.
- § For online submissions, an electronic declaration is included in the report.
- § State how the grant supported the work of the organization and/or improved the quality of life in Alberta.
- § The grant recipient must return any grant funds not spent to the Government of Alberta (Minister of Finance and Enterprise).
- § Any grant recipient that does not comply with information and reporting requirements within the required timeframes and/or who uses the grant funds for an inappropriate purpose will be ineligible to receive additional grant funding until there is an acceptable resolution.

## 11.3 Communication Requirements

- § In the final report, grant recipients are required to indicate methods used to acknowledge the grant from the Government of Alberta (website, newsletters).
- § For funding acknowledgement, include a short, written statement in your newsletter, brochure, website, etc. when acknowledging the grant. The Community Spirit Program does not have its own logo. For use of the Government of Alberta (GOA) logo, contact the program office.
- § Information provided by the recipients on the use of the grant may be used by the Government of Alberta to profile the Community Spirit Program and report on its benefits. If the organization plans to identify the names of specific individuals who have benefited from the grant in the final report, please obtain their consent to do so. A copy of the consent must accompany the final report.