

Partners in Climate Action: Budget Template Guidance

Applicants are required to complete the budget template to help substantiate and assess the funding request. The budget should:

- Correspond to the activities identified by the applicant in Section G3 - Project Work Plan of the Grants Ontario application form.
- Be presented by fiscal year (April 1, 2017 – March 31, 2018 in tab 1; April 1, 2018 – March 31, 2019 in tab 2). The amount requested from Partners in Climate Action should be no more than \$200,000 in total over the two years.
- Propose appropriate use of Partners in Climate Action (the program) funds involving only eligible expenditures. A list of eligible and ineligible expenditures is presented at the end of this document.
- Provide the dollar value and source of cash and/or in-kind contributions from lead or partner organizations or other funders. Applicants are encouraged to identify other sources of funding to cover eligible and ineligible expenditures required to deliver the project.

Filling out the Budget Template

Example Tab	Review the example tab in the budget template. It provides mock entries that illustrate some of the requirements set out below.
Fiscal Year Tabs	Present the budget by fiscal year; the template provides a separate tab for each fiscal year covered by the program.
Column A - Project Expenditures	<p>In column A explain what specifically the funding will be spent on. Do not name an activity; provide detail on what will be purchased to deliver the activity (for example, rather than identifying 'workshop' as a project expenditure, applicants should itemize what goes into putting on a workshop, such as 'venue', 'training materials', and so forth).</p> <p>All expenditures (eligible and ineligible) required to carry out the project</p>

should be included. Each entry should include a short description, and if applicable the number of units and unit cost. Large expenditures must provide a detailed breakdown of the underlying purchases.

Column B -
Budgeted Costs

In column B provide the total cost of each project expenditure.

Column C - Amount
Requested from the
Province

In column C provide the amount of program funds that would be allocated to that expenditure.

Columns D & E Cash
and In-kind Support

Columns D and E respectively should provide the value of cash and in-kind support, secured from other sources, which will be allocated to that project expenditure.

Cash: the value of any financial donations, sponsorships, grants or loans.

In-kind support: the total cash value of donated goods, commodities, or services such as volunteer hours, marketing services, equipment and/or office space provided to the organization at no cost. Itemize in-kind contributions in the budget template including a verifiable value of each contribution.

Column F – Balance
to be Obtained

Column F will be automatically populated based on the figures inputted into rows B through E. This is the amount of funds not yet secured by the applicant nor requested from Partners in Climate Action. This figure represents the funding gap that will remain after the program funds are taken into consideration.

Column G – Sources
of confirmed other
funding or in-kind
support

In Column G applicants should identify the source of any cash or in-kind support that has been secured and allocated to that project expenditure.

The province requires a letter of support from each funder or partner confirming the commitment of cash and/ or in-kind support. Letters should be submitted as an attachment to the application. Each letter must outline the specific roles and responsibilities the partner or funder will undertake in the project. (See Section J – Partnership Information in the Application Guide for further details).

Column H - Notes

Column H should be used to provide any assumptions or additional

information that will help the province to understand and assess the funding request.

Eligible Expenditures

Eligible expenditures

- Project personnel:
 - ✓ Staff salaries and benefits
 - ✓ Consultants
- Project goods and services (e.g., for meetings, workshops and/or events):
 - ✓ Rented equipment
- Project-related travel, accommodation and hospitality:
 - ✓ Travel costs include transportation within Ontario, meal costs and accommodation
 - ✓ Hospitality for meetings, workshops, and/or events
- Project administration: Up to 15% of the funding amount or \$20,000 per fiscal year whichever is less*
 - ✓ Supportive service: time spent by staff in HR, finance, IT and communications
 - ✓ Expenses: postage/courier charges, office supplies, photocopying charges, financial institution fees

Ineligible expenditures

- Non-project personnel:
 - × Permanent non-project staff salaries and benefits
 - × Bonuses
 - × Membership fees

- × Honoraria and gifts (exception: honoraria are eligible expenditures for Indigenous organizations)
- Project equipment:
 - × Purchased equipment and capital for the project**
- Non-project related transportation, accommodation and hospitality:
 - × Travel outside of Ontario
 - × Alcoholic beverages
 - × Entertainment
 - × Anything not directly attributable to the project
- Non-project related administration:
 - × Administration staff salaries and benefits
 - × Ongoing organizational expenses
 - × Overhead: mortgage, rent, insurance for regular operations***
 - × Avoidable financial institution service fees (e.g. insufficient funds charges)

* Project administration costs should not exceed 15% of the total budget or \$20,000 per fiscal year whichever is less. Project administration costs include administrative staff, postage/courier charges, photocopying charges, office supplies, and financial institution service fees incurred in carrying out a project.

**Project equipment should be rented and not purchased in most cases. However, the province may approve of purchase of project equipment if: 1) total rental costs are greater than the one-time purchase cost; 2) the equipment is not a type found in a normal office environment; and, 3) it is unlikely that the recipient would purchase the equipment if not for the project.

*** Overhead costs are not eligible as they would be incurred for regular business and are not directly associated with the delivery of the project. Eligible expenditures must be project specific and incremental to the existing expenses of the applicant organization.