
Grant Application for Technology Adoption Policy

1.0 Objective & Intent

This policy establishes a standardized framework for identifying, applying for, and managing government grants and subsidies aimed at technology adoption within our cabinet and millwork manufacturing operations. The primary objective is to reduce capital expenditure burden on cash flow by securing non-dilutive funding for software, automation, and digital infrastructure projects. Successful grant acquisition directly improves our competitive position by enabling faster deployment of advanced manufacturing technologies, while mitigating financial risk and enhancing compliance with federal and provincial innovation programs. This policy ensures that all grant applications are pursued with due diligence, proper documentation, and alignment with strategic operational goals.

2.0 Operational Scope

This policy applies to all departments involved in technology procurement and implementation, including Operations, IT, Finance, and Executive Management. It covers all grant applications submitted to federal (e.g., NRC IRAP, CanExport), provincial (e.g., Ontario's Smart Manufacturing Fund, Quebec's PME MTL), and municipal programs that support technology adoption in manufacturing. Transaction types include capital equipment purchases, software licensing, cloud infrastructure, automation systems, and employee training related to new technology. This policy does not cover R&D tax credits or non-technology-related grants.

3.0 Compliance & Data Security

All grant applications must comply with Canadian privacy laws, including PIPEDA, ensuring that personal information of employees, partners, or clients is not disclosed without consent. Financial data submitted must be accurate and verifiable, with internal controls requiring dual approval (Operations Manager and Controller) for any application exceeding \$50,000. All grant-related records—including application forms, supporting documents, correspondence, and final reports—must be retained securely for a minimum of seven years in a centralized, access-controlled digital repository. Access to sensitive grant data is restricted to authorized personnel only, and any breach must be reported immediately to the Compliance Officer. Additionally, all claims must be supported by original invoices and proof of payment to avoid audit penalties.

4.0 Required Software & Administrative Tools

- ERP System (e.g., Microsoft Dynamics 365 Business Central or equivalent)
- Grant Management Software (e.g., GrantConnect or SmartSimple)
- Document Management System (e.g., SharePoint or Google Workspace)
- Accounting Platform (e.g., QuickBooks Online or Xero)
- CRM Module for tracking grant-related communications (e.g., Salesforce or HubSpot)
- Secure File Sharing Tool (e.g., OneDrive or Dropbox Business)
- Calendar and Task Management (e.g., Microsoft Planner or Asana)

5.0 Step-by-Step Administrative Workflow

1. Identify eligible grant programs by scanning federal, provincial, and municipal databases monthly; assign a preliminary eligibility score (High/Medium/Low) based on alignment with current technology adoption roadmap.
2. Prepare a grant opportunity brief (including funding amount, deadlines, and eligibility criteria) and submit to the Operations Manager for review within 5 business days of identification.
3. Upon approval, form a cross-functional team (Operations, IT, Finance) to gather required documentation: business case, technology specs, quotes from vendors, and financial statements.
4. Draft the application narrative, ensuring it clearly demonstrates how the technology will improve productivity, reduce waste, or enhance quality; obtain sign-off from the Controller for all financial projections.
5. Submit the application through the designated portal or by mail at least 10 business days before the deadline to allow for corrections.
6. Track application status weekly; if additional information is requested, respond within 3 business days with a complete and accurate submission.
7. Upon grant approval, execute the funding agreement within 15 business days; ensure all conditions (e.g., matching funds, reporting milestones) are documented in a project charter.
8. Implement the technology project according to the approved timeline, maintaining a separate cost ledger for all grant-eligible expenses.
9. Submit interim and final progress reports as required by the grantor, including financial reconciliation signed by the Controller, within 30 days of each reporting period end.
10. Upon project completion, conduct a post-implementation review to assess actual benefits vs. projected outcomes; archive all grant records in the centralized repository.

Regulatory & Financial Disclaimer: This document is an administrative template provided for educational and organizational purposes only. It does not constitute certified CPA, tax, or legal advice. The end-user assumes all liability for validating these procedures against local corporate law, Canadian privacy frameworks (e.g., PIPEDA), and Generally Accepted Accounting Principles (GAAP) before operational deployment.