



POLICY

Municipal Grant and Donation Policy

Policy Type: Treasury

Effective Date: September 12, 2017

Department: Corporate Services

Approval Level: Council

Division: Finance

Policy #: 8-8

1.0 PURPOSE

- 1.1 To provide support to non-profit groups or organizations that provide programs, services or events that are of a general benefit to the community and to offer awards and gifts to persons whose actions or achievements are, in the opinion of Council, worthy of note and recognition.

Funding for Municipal Grants and Donations is contingent on the approval of the operating budget by the Township of Wainfleet Council.

Every year the Township receives more grant requests than it can fund. The objective of this policy is to treat all organizations fairly and consistently. The aim of the Township's Municipal Grant and Donation program is to provide modest levels of support and assistance to community non-profit organizations and volunteer groups. Supporting volunteer, community-based organizations is often fundamental to maintaining our quality of life.

This policy provides for two types of grants and donations: a direct grant of funding and an in-kind contribution grant. In-kind grants include the contribution of municipal property/facilities, materials or resources other than cash. The financial value of in-kind services requested by applicants will be identified by the relevant municipal department. Council will consider the financial value of the in-kind services during the application evaluation process.

2.0 POLICY STATEMENTS

- 2.1 The Township of Wainfleet recognizes the valued contributions being provided through the volunteer efforts of community groups and organizations on behalf of Wainfleet residents. Municipal grant and donation funding demonstrates Council's commitment to working with groups and organizations which provide these beneficial programs, services or events to the community while at the same time recognizing the financial constraints impacting the Township's ability to provide funding to these groups and organizations.

3.0 APPLICATION

3.1 This policy establishes eligibility requirements, identifies the types of funding available, and outlines the application process.

3.2 This policy does not govern the following, which are separately administered:

- scholarships, awarded for the highest academic achievement to any Township of Wainfleet student attending E.L. Crossley, Lakeshore or Port Colborne High School;
- Niagara Central Airport Commission operating and capital grants.

3.3 Funding Eligibility

An applicant group or organization must meet the following criteria in order to be considered for a Municipal Grant or Donation:

- A group or organization must show that it involves volunteers and offers programs which address identifiable needs in the Township of Wainfleet or which bestow benefit to the general Wainfleet community;
- The group or organization must be a non-profit organization;
- The group or organization shall have been in existence for at least one year;
- A group or organization must demonstrate a clear need for the funds being requested in order to enable the group or organization to provide a specific program, service or event;
- The group or organization shall have designated Executive Members or a Trustee who will assume responsibility for the administration of the funds provided;
- The group or organization must be located within the Niagara Region, or provide a direct benefit to the Township of Wainfleet and/or its ratepayers.
- A group or organization shall submit, by November 1st of each year, a completed application form that is attached hereto as Schedule A;
- All applicants must provide a budget for the upcoming fiscal year or for the specific project/event for which the grant funding is being sought. For applications of \$500 or more, a copy of the group or organization's most recent annual financial statements must be attached to the application.
- An organization has fulfilled any obligations outstanding from previous grant awards.

3.4 Grant Program Components

The total grant funding approved by Council as part of the annual budget will be allocated across two grant streams:

Stream #1: Direct benefit to Wainfleet residents/ratepayers

A direct benefit to Wainfleet residents means that the group or organization service boundaries include Wainfleet and:

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- at least one service, program, or activity location is in the Township or
 - 50% or more of the individuals served reside in the Township.

Stream #2: Indirect benefit to Wainfleet residents/ratepayers

An indirect benefit to Wainfleet residents means that the group or organization must have a known presence in the Niagara Region and provide non-profit services, programs or activities to Township of Wainfleet residents.

- 3.5 Seventy percent (70%) of the approved annual grant budget will be allocated to groups or organizations that qualify for Stream #1. The remaining thirty percent (30%) will be allocated to Stream #2.

3.6 Activity Eligibility

Council recognizes that many groups and organizations conduct events and provide programs and services that benefit the community. Generally, Council will consider requests for event, services and programs that fall under one of the following categories:

A. Operating Support Grants

Funding assists with the general operating expenses of an applicant, including administrative costs and program-related expenses. Awarded to support an on-going community based program recognized as a priority within the community.

B. Community Social, Recreation and Parks Grants

Funding assists with community based recreation programming, seniors programming or property and community facilities maintenance (buildings, sites, trails, beaches).

C. Community Cultural and Heritage Grants

Funding supports cultural and heritage conservation and public education.

D. Community Festival and Event Grants

A one-time or recurring event that Council has determined provides some significant benefit to the community, and is open to all members of the public.

E. Community Development Grants

Funding to support:

- economic advancement of the community,
- education and training of people within the community,
- health and welfare of people within the community.

3.7 Funding Ineligibility

Council will not consider providing a Municipal Grant or Donation to the following:

- Individuals;
- For profit businesses;
- Organizations or groups with political or religious affiliation;
- Organizations who have failed to provide satisfactory reports, including financial statements, as to the success of the previous year and specifically with respect to the allocation of grant funds.
- Other levels of government

3.8 Activity Ineligibility

Grants and donations will not be made for the following purposes:

- Discriminatory activities and events;
- Activities that are contrary to the policies of the Township;
- Activities which are deemed to be unlawful.

While Council will consider requests for a direct grant/donation of funds (monetary) or in-kind contribution (non-monetary), there is no guarantee that a request will be approved.

Council will set an amount annually in the budget to be apportioned to grants and donations. Each request will come before council in writing to be considered. Once the annual budgeted amount has been exhausted, any further donation requests will not be considered. They may be held in a file to be reviewed during the next budget process.

3.9 Types of Financial Assistance

Municipal Grant and Donation requests include monetary contributions as well as in-kind contributions for Township owned resources outlined as follows:

Township owned resources eligible for in-kind contributions include:

- Use of a Township owned facility (fee waived/reduced)
- Use of Township owned equipment (fee waived/reduced)
- Use of Township owned materials (fee waived/reduced)
- Use of staff resources (regular hours/overtime)

3.10 Processing Applications

All municipal grants and donations, regardless of purpose, will be considered concurrently by Council during the annual budget process. To be considered by Council, all grant applications must:

- I. Be received by November 1st of each year for grants or donations requested to be included for consideration in the budget of the following year.
- II. Include all necessary application documentation and information.
- III. Grant applications must be on the forms provided by the Township of Wainfleet.

Incomplete applications will not be forwarded to Council for consideration.

Grant application forms received, will be date-stamped and acknowledgement sent to the applicant.

Upon receipt of the applications, Township staff, or a review committee will evaluate each application to ensure that each is in compliance with the eligibility criteria.

Complete grant applications received by the deadline and determined to be in compliance with the eligibility criteria will be presented to Council, during a regular meeting of Council, for consideration.

Council will choose to allocate, or not allocate, funds to eligible groups or organizations, as they deem appropriate.

Council is not constrained by the amount requested by the applicant in the application, but rather may opt to award less or more than requested.

Cheques will be issued for the total amount that Council has approved for each group or organization.

Only one grant request per group or organization per year will be considered.

Grants and donations made by the Township are not to be regarded as a commitment by the Township to continue such grants/donations in the future.

No grant/donation or in-kind contribution will be considered unless specifically authorized by Council in the form of a resolution of support.

In making a grant or donation, the Township may impose such conditions and/or restrictions as it deems fit.

3.11 Notification

All applicants shall be notified by the Township Clerk, in writing, regarding the decision of Council. All notices of decision by Council will be incorporated in the minutes of the Council meeting.

3.12 Right of Appeal

There shall be no right of appeal. Council's decisions regarding grants and donations are final.

3.13 Requests for Assistance Outside the Scope of this Policy

Notwithstanding any other provision in this policy, Council may make grants or donations to groups or organizations at any time during the year where they deem such contributions to be warranted due to extraordinary situations.

Nothing in this policy prohibits Council from considering financial assistance or in-kind support outside the scope of this policy. Council may consider each case on its merits and any assistance provided will be without precedent.

3.14 Compliance

The Township reserves the right to request any and all information that the Township deems necessary in order to determine compliance with the requirements of this policy.

3.15 Financial Accountability

Grants may be awarded with certain terms and conditions. The letter of award will state if any particular restrictions apply to the grant. Funding, including multi-year grant awards, may be revoked for failure to comply with the terms and conditions.

Successful applicants who receive funding from the Township must report on how the funding was spent and the impact the funding achieved. Reports must be submitted to the Township by November 30th of the same year for which the grant is awarded. For example, if a grant is awarded in January 2019, the grant recipient must provide a completed report by November 30, 2019.

Organizations that require by law, reviewed or audited financial statements, shall provide a copy of those statements, along with a copy of the management letter (if applicable), on an annual basis.

3.16 Roles and Responsibilities

Council is responsible for determining what amount will be included in the annual operating budget for Municipal grants and donations. They are also responsible for the assessment of grant applications in relation to the assessment criteria outlined in the policy and the determination of how the funding will be allocated to specific projects.

Township staff is responsible for preparing and posting the application form, reviewing the applications to determine the eligibility based on the requirements of the policy, determining if additional information should be requested, and including information within the draft budget documents for Council's consideration. After Council has determined which requests will be funded, staff will issue payments and track post project reports.

Applicants are responsible for the accurate completion of the application form, submitting by the deadline, any supplementary information if required, and completing the reporting requirements.

4.0 DEFINITIONS

4.1 **Applicant** – the group or organization making the request

Clerk – the person appointed by Council to fulfill the responsibilities and duties

of the Clerk as defined in Section 228 of the Municipal Act and his/her designate

Council – the duly elected officials for the Township, being the Mayor and Aldermen.

Facility – municipal lands (parks and sport fields), buildings and portions of buildings available for rent or lease that are owned and operated by the Township.

Fees – fees levied with respect to the renting/leasing of facilities and related fees as set out in the Township’s Fees and Charges By-Law.

In-kind grant- the contribution of municipal property/facilities, materials or resources other than cash.

Non Profit Organization – an organization that does not exist to make a profit and provides public benefit through arts, culture, recreation, education and/or community-focused activities operating within the Niagara Region.

Other Levels of Government – includes:

- Crown Agencies and Corporations (Federal and Provincial)
- Hospitals
- School Boards
- Universities, Colleges and Post Secondary institutions
- Approved agency designated as a Children’s Aid Society
- Community Care Access Centres
- Local Boards
- Boards of Health

Township – Corporation of the Township of Wainfleet.

5.0 APPENDIX, RELATED POLICIES, PROCEDURES & LINKS

- 5.1 Municipal Grant and Donation Application Form
- Ice Allocation Policy
- Municipal Act
- By-Law BL005-2016 Fees and Charges

6.0 AMENDMENTS/REVIEWS

Next Review Date: September 2019

Date: September 18, 2018

Section(s) Amended: 3.4, 3.6, 3.7, 3.10, 3.15, 3.16, 4.1

Comments: