

CORPORATION OF THE TOWN OF SHELBURNE

MUNICIPAL FUNDING POLICY

PURPOSE:

The Town of Shelburne recognizes the valued contributions being provided through the volunteer efforts of community organizations and agencies on behalf of the citizens. Community grant funding demonstrates Council's commitment to working with groups which provide these beneficial programs, services or projects to the community while at the same time recognize the financial constraints impacting the Town's ability to provide funding to these groups.

POLICY:

This policy establishes eligibility requirements; identifies the types of funding available; and outlines application and monitoring requirements.

Preferences will be given to organizations that demonstrate community support, efficient use of resources, sound business practices and develop volunteer knowledge, skills and self-reliance.

Program Intent

Every year the Municipality generally 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 'Municipal Funding Policy' is to share available resources throughout the municipality. Grants and Sponsorships are intended to provide modest levels of support and assistance to community non-profit organizations.

Each year, as part of its annual budget process, Council will determine the amount of funding to be provided for all municipal grants in aid including: Corporate grants, In-Kind Contribution grants, Special Events grants, Community Event grants and Sponsorship grants.

Council will, through its annual operating budget, determine the amount of funds to be allocated to the grant program. Council will retain the right to make the final decision on both the overall grant allocation and the individual grant.

Types of Grants

The different types of grants awarded under the Municipal Grant Funding Program are as identified.

Corporate grants are defined as operating funding to assist with the general operating expenses of the group, including administrative costs and program-related expenses.

In-Kind Contributions grants are based on the provision of municipal property/facilities, materials or resources to an applicant, and do not include the provision of cash funds to, or on behalf of, the applicant. While cash funds are not provided in relation to In-Kind grants, it is recognized that such grants will involve either an expense or foregone revenue for the municipality. Each application for In-Kind grants will include the estimated value of the application under consideration.

Special Events are defined as any one-time or first-time event that is of cultural, social or recreational significance to the community and which may have the participation of more than one organization.

Community Event is defined as a recurring event that Council has determined provides some significant benefit to the broad community, and is open to all members of the public.

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Sponsorship Funding requests are based on an external organization, enterprise or association requesting financial assistance, whereby the Town contributes money, goods or services to a program, project or special event in return for recognition and acknowledgement of receiving funding from the Town. Organizations are required to report on how money was used including producing invoices and proof of payment for goods and services at year end.

Funding Eligibility

An applicant organization must meet the following general criteria in order to be considered for a Town of Shelburne grant:

- Grants are awarded by the type of project, not the type of organization/agency.
- There can only be one application per organization/project.
- Grant applicants should be able to demonstrate active fundraising efforts to support the continuation of a program, project or service. The Town of Shelburne grant should not be considered as the primary source of funding for the organization.
- Funding requests can be defined as events/projects/programs that support, sustain, promote, inform, educate, celebrate, preserve, and/or provide access to the arts, culture, environment, heritage, recreation and/or health activities.
- Each application must demonstrate there is a need for financial assistance and that adequate funding from other sources is not available.
- To qualify for funding, the group must demonstrate its commitment to all of the following principles:
 - accessibility;
 - effectiveness; and
 - accountability through sound management and financial practices.
- Individuals are not eligible
- The applicant organization, within the current fiscal year, must spend grant funding on the sole purpose for which it was awarded.

Application

All grant applications shall be directed to the Treasurer or Deputy Treasurer on or before August 31st of each year to ensure they are incorporated in the annual budget.

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

All applications shall be submitted on the Grant Application form together with the following information and documentation:

1. Outline the level of service the organization provides to the community;
2. The amount of financial assistance required;
3. The degree in which the community benefits as a result of the grant;

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4. A proposed budget for the current year, detailing expenditures and revenues, including a list of all other grants and/or donations;
5. Sponsorship funding requesters are required to submit a letter to the Town including the amount of financial assistance required and explain how the funds will be utilized, along with a proposed budget for the year in which the funding is requested.

Application Review Process

Late or incomplete applications for any grants will not be forwarded for consideration.

Completed applications for Corporate grants, and Community Event grants (as defined by this policy) which are received by the August 31st application deadline will be forwarded to the Council as a Whole and/or Budget Steering Committee during budget deliberation meetings for review and consideration.

In considering grant applications, Council and/or the Budget Committee will evaluate applications in terms of the general and financial criteria and principles outlined in the Municipal Funding Policy and interview any group during the yearly budget deliberations with final recommendations based on the total grant allocation and approval of individual grants.

Granting of assistance in any one year or over several years is not to be interpreted as a commitment to future year's funding.

Recognizing that unique and beneficial "Special Events/Sponsorship" requests may also arise from time to time outside of the time lines noted in this policy, applications for "Special Events and Sponsorship" grants received after the grant deadline shall be forwarded directly to Council for its consideration.

Applications for In-Kind non-financial assistance will be forwarded to the respective department for review with a report to Council for consideration and approval.

Grant applications determined to be ineligible for funding shall be notified, in writing, of Council's decision.

Mid-Year Review Process

Community groups that will be seeking funding for consecutive years will be required to provide a midyear report which will include the following information:

1. A multi-year financial forecast (3 to 5 years) for the organization which should include estimated revenues and expenditures;
2. Evidence of completed or planned applications for funding from other funding sources including other levels of government where applicable for the following year;

This information must be submitted to the Treasury Department no later than August 1st.

Financial sustainability is critical to the ongoing success for this program. Community groups should not rely on this program as their main source of funding each year.

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Payment

The term of a grant shall be for one year only or unless Council has endorsed a multi-year commitment.

Applicants are advised that grants will not be continued from year to year.

Renewals are not automatic nor is any increase in funds.

Grant recipients will be notified in writing of the grant amount approved following Council approval of the Town's annual budget.

Grants may be awarded with certain terms and conditions. The letter of award will state, if any, particular restrictions apply to the grant.

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