



Policy

Community Grants Policy

Policy Type: Corporate Policy

Department: Finance

1. Policy Statement

1.1. The Municipality of West Grey believes that community organizations play an essential role in improving the quality of life of West Grey residents. The Municipality of West Grey recognizes the valued contributions being provided through the efforts of community organizations and agencies on behalf of citizens. Grant funding demonstrates council's commitment to working with groups that provide these beneficial programs, services, or events to the community.

2. Purpose

2.1. This policy is intended to enable the Municipality of West Grey to provide grants to non-profit organizations and groups who operate within, and/or provide services to, the Municipality of West Grey for any purpose that council considers in the interest of the municipality. These services include but are not limited to the areas of recreation, arts and culture, environmental and other activities that support purposes beneficial to the community.

3. Overview

3.1. The Municipality of West Grey recognizes the need to assist community organizations operating as non-profits in taking on new initiatives and assisting organizations in carrying out their responsibilities. Municipal Grants are intended to be supplementary to an organization's main source(s) of revenue. The grant shall not be considered as the primary source of funding for the organization. The organization must show exploration of other financial and in-kind support (i.e.: fundraising and volunteer support).

3.2. Evidence of service need or uniqueness of service provided (responsiveness to community) must be outlined. Equity and accessibility to participants must be demonstrated.

3.3. Approval of funding is only for the fiscal year in which the organization has applied. It is not to be regarded as a commitment by the municipality to continue such assistance in future years. If applicable, municipal grants will only be available to organizations who have complied with the reporting requirements of any previous grants.

3.4. Funding requests may be reduced in value at the discretion of council to support a wider range of initiatives.

3.5. Grants may be awarded with certain terms and conditions. The Letter of Award will state if any restrictions apply to the grant.

3.6. Grant applicants determined to be ineligible for funding or denied funding in any given year shall be notified in writing. The municipality is not obligated to allocate funds to any organization regardless of the fact that they satisfy the eligibility criteria and meet all of the objectives of this policy.

4. Annual Grant Funding

4.1. Council shall establish annually a monetary amount in the budget for all grant requests as part of the annual municipal budget process.

5. Eligible Projects for Funding

- Supporting youth/senior events
- Community beautification
- Arts, culture, and heritage projects and/or events
- Community special events

6. What the Grant Program Will Not Fund (Ineligible Expenses)

- For-profit events
- Private events
- Staffing/staff time costs
- Alcohol
- Capital and operating expenses not related to the request
- Organizations with political affiliations
- Other levels of government
- Schools/school boards
- Programs that other levels of government have legislated responsibility for funding. This includes funds to 'top up' shortfalls for government mandated programs. Some examples would include school board educational programs, public health programs, provincially mandated childcare/services or social assistance programs and health care services
- Retroactive payments. These are activities or costs incurred before grants are approved

7. Grant Types

7.1. Requests may be made for monetary and/or in-kind contributions. While cash funds are not provided in relation to in-kind contributions it is recognized that such grants shall involve either an expense or foregone revenue for the municipality. Each application for in-kind grants shall be required to include an estimated monetary value of the request under consideration.

8. Application Guidelines

- 8.1. The application period will typically open annually on the first Monday of September. All grant applications shall be submitted on the Community Grant Application Form and directed to the finance department, on or before January 31 of each year. Applications submitted after January 31 will be reviewed on a case-by-case basis subject to funding availability.
- 8.2. It is the responsibility of the organization to submit a complete application with clear and sufficient information. Incomplete or unclear applications may be denied.
- 8.3. Submission of an application does not guarantee the organization will be awarded all or part of the grant requested.
- 8.4. The allocation of municipal grants will occur after the annual municipal budget is approved.
- 8.5. Projects will be considered ineligible if commencement of work begins before project approval.
- 8.6. Grant applications, in any given year, shall not automatically be considered in future years. Applicants must re-submit grant applications on an annual basis.
- 8.7. Grant application forms shall include financial information including a budget for the event/project/program including funding requested/received from other organizations. Applicants are asked to include as accurate budgets as possible including any quotes received (if applicable).
- 8.8. For requests related to the waiver or reduction of fees for parks and/or facilities, the applicant shall be required to complete and comply with the terms of the rental agreement.
- 8.9. Submission of a grant application does not guarantee that an organization will receive full or partial funding.
- 8.10. Requests related to in-kind contributions are subject to the availability of the resource(s) being requested. Requests for in-kind contributions must be included in the project budget.
- 8.11. Requests related to a capital project to be constructed on municipal land requires council sanction before proceeding. The request must detail the project design with a budget including future maintenance costs.
- 8.12. The Municipality of West Grey shall not contribute to outstanding deficits. In the event that a recommendation is made to provide funding for a program from which the municipality is owed funds, the municipality has the right to reduce the recommended grant amount by the amount of monies outstanding.
- 8.13. Grant applicants are required to provide sufficient proof of insurance (where applicable) prior to funding being received.

9. Eligibility Criteria

- 9.1. An applicant organization must meet the following general criteria to be considered for a community grant:
 - 9.1.1. Operate as a non-profit organization with the ability to confirm such status to a level deemed satisfactory by the municipality. Any specific service, program or activity for which funding is requested must also be not-for-profit in nature. Organizations do not need to be registered as a non-profit organization to meet this criterion.
 - 9.1.2. Applications must meet one of the funding categories specified in this policy.
 - 9.1.3. Applicants must complete the Community Grant Application Form in full.
 - 9.1.4. Demonstrate that the applicant organization has explored and/or is receiving other sources of financial support. Grants are intended to be supplementary to main sources of funding for organizations.

10. Exclusions

- 10.1. Grants shall not be available to groups that have failed to comply with reporting requirements from previous grants.
- 10.2. Organizations and/or charities whose primary focus is not within the municipality shall not be considered for a municipal donation or grant.
- 10.3. Private individuals and businesses are not eligible to apply for a grant through the Community Grant Program.
- 10.4. Unless special circumstances warrant, consideration shall not be given to requests for grants from recreational sport groups (with the exception of minor sports organizations), nor shall funds be used to sponsor an individual athlete or team for a competition or to subsidize participation in a sports event.
- 10.5. Grants shall not be provided to fund projects on or at private residences.

11. Procedure

- 11.1. All requests for financial donations and grants shall be considered having regard for the municipality's current budget. Only one request per organization is to be considered per year.
- 11.2. The finance department shall review applications for completeness, accuracy, and compliance with this policy. Applicants may be required to provide additional information before the request is presented to council.
- 11.3. Applications for non-financial in-kind assistance shall be forwarded to the respective department for review. The department manager shall review and provide in a report

the financial impact of the request and the availability of the resource being requested.

- 11.4. Council shall review and assess all grants/awards in terms of the need for the project, cost effectiveness, financial viability, and contribution to the quality of life in the community and community involvement/response.
- 11.5. Council shall make the final decision on all grants/awards.
- 11.6. The finance department shall notify all applicants of council's decision once the municipal budget has been approved and grant applications have been reviewed.
- 11.7. Revenues related to in-kind services shall be recorded in the respective department and the expense shall form part of the municipal grant expense budget line.
- 11.8. Grant funds shall typically be awarded in one lump sum payment prior to the project commencing.

12. Accountability

- 12.1. Applicants awarded a grant shall be held accountable for the expenditure of the funds in accordance with the stated objectives/plans. Grants in future years shall be reviewed based on past demonstrated fiscal responsibility of the applicants.
- 12.2. Funds granted under this program are not transferable between projects or groups without prior council approval and must be used for the specific purposes outlined.
- 12.3. In the event that the project does not go forward, the grant recipient shall return those funds granted for the proposed project.
- 12.4. Grant recipients are required to complete the project as outlined in the grant application. Project changes must be submitted to the municipality in writing for approval.
- 12.5. Grant recipients are required to submit proof of payment for the project including copies of receipts and invoices as part of the final status report. Any unspent funds and/or ineligible expenses shall be required to be returned to the municipality. The municipality will not be responsible for any project overages.
- 12.6. Grant recipients must complete a status report form and submit it to the municipality within 60 days of the event/project completion. Failure to comply may affect the eligibility of future grant approvals. Final status report forms shall include:
 - Project/event information
 - Project/event attendance (where applicable)
 - Copies of receipts/invoices
 - Photos of project/event.

13. Municipal Recognition

- 13.1. Organizations receiving financial support shall acknowledge the Municipality of West Grey's contribution through all printed material and other promotional means. Copies of the municipal logo and subsequent branding standards are available by contacting the municipality.
- 13.2. All promotional material referencing the municipality must be approved by the municipality.

14. Evaluation Matrix

- 14.1. Each council member shall complete an evaluation matrix and give each applicant a score using the established evaluation matrix form, attached hereto and forming an integral part of this policy. This score shall be used to determine the amount of dollars for each applicant if the request for grants exceeds the funds available. The following criteria shall be used to evaluate the various applications:
 - 14.1.1. The initiative shall have a positive impact on the community.
 - 14.1.2. The initiative provides access to the arts, culture, environment, heritage, recreation, lifelong learning and/or health activities.
 - 14.1.3. The project, initiative or event shall contribute to the economic prosperity of the Municipality of West Grey and/or promote civic pride.
 - 14.1.4. The initiative demonstrates broad support by way of having adequate funds and support from other sources and stakeholders and/or significant evidence of broad community support.
 - 14.1.5. The initiative benefits a significant number of residents.



Application for Municipal Grant

Submit Original To:

The Corporation of the Municipality of West Grey
Attention: Finance Department
402813 Grey Road 4 RR2 Durham,
Ontario, N0G 1R0

Submission Deadline: Applications are due each year by January 31.

1. Organization information:

1a)

| | |
|---|--|
| Legal organization name: | |
| Type of organization: | |
| Mailing address: | |
| Website / social media: (if applicable) | |
| Operational since: | |
| Is the organization an incorporated non-profit? | <input type="checkbox"/> Yes (Date incorporated: ___/___/___) <input type="checkbox"/> No |

1b) What are your organizational goals / objectives?

| |
|--|
| |
|--|

2. Application contacts:

Please include the main point(s) of contact for this application

| | |
|----------------------------|--|
| Lead contact name: | |
| Lead contact email: | |
| Lead contact phone #: | |
| Secondary contact name: | |
| Secondary contact email: | |
| Secondary contact phone #: | |

3. Project information:

3a) Please outline the project information below

| | |
|--|--|
| Project title: | |
| Project date(s): | |
| Project location(s): | |
| Is this the first time your project is taking place? | <input type="checkbox"/> Yes <input type="checkbox"/> No (Number of years in operation: ____) |
| Does this project directly benefit residents of West Grey? | <input type="checkbox"/> Yes <input type="checkbox"/> No |

3b) Please describe the project in detail including goals and objectives. Additional pages may be attached if necessary.

3c) Describe how your organization will benefit from municipal funding. Additional pages may be attached if necessary.

3d) How will you determine if your project is a success? Please include any performance metrics you will be using to determine this. Additional pages may be attached if necessary.

4. Funding information:

| | |
|--|---|
| Have you reviewed the West Grey Grants to Organization Policy ? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Is this your first request for funding from the municipality of West Grey? If no, please outline the years in which your organization submitted requests for funding. | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Has your organization previously received funding from the Municipality of West Grey? If yes, please outline funding received and number of years. | <input type="checkbox"/> Yes <input type="checkbox"/> No |

5. Project budget:

Please outline in detail your total project budget. If applicable, please include any quotes received. Additional pages can be attached if required.

| Item description: | Budgeted amount: |
|--|-------------------------|
| Example: Purchase of three 10x10 tents for event booths @ \$50.00 each | \$150.00 |
| | \$ |
| | \$ |
| | \$ |
| | \$ |
| | \$ |
| | \$ |
| | \$ |
| | \$ |
| | \$ |
| | \$ |
| Total: | \$ |

6. In-kind contributions:

Please include any in-kind contributions being requested of the municipality. In kind contributions include items such as facility rentals. Additional pages may be attached if necessary.

| In kind contribution request: * | Estimated amount: |
|--|--------------------------|
| Example: Use of Lamlash Hall on Saturday June 1 for event (12:00-5:00pm) | \$75.00 |
| | \$ |
| | \$ |
| | \$ |
| Total: | \$ |

*In-kind contribution requests are subject to municipal approval and availability. All relevant guidelines and municipal policies apply.

7. Project funding:

| | |
|---|---|
| Total project costs: (Total project cost must match combined totals of part 5 and 6 above) | \$ |
| Are you sourcing funding or in-kind support from any other sources? If yes, please outline the other funding sources and if funding has been received. | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Total funding requested from the municipality: (Total project costs less other funding sources) | \$ |

7. Describe how your project / event will benefit the community.

Additional pages may be attached if necessary.

8. Declaration of Organization’s Executive:

We certify that, to the best of our knowledge, the information provided herein is accurate and complete and is endorsed by the Organization, which we represent.

If successful recipient of municipal grant funding, we agree and abide by the information as outlined in the **municipal grants to organization policy** and indemnify and save harmless the municipality from any and all losses, liabilities, damages, costs, claims, suits or actions arising from the provision of the program(s) identified above.

| Name: | Title: | Date: | Signature: |
|-------|--------|-------|------------|
| | | | |
| | | | |
| | | | |

*This Application must be signed by minimum of two (2) members from your organization.
Note: Any information collected may be made public.



Final Report for Municipal Grant

Mandatory questions are marked with asterisks (*).

1. *Report completed by:
 - a. Name:
 - b. Title:
 - c. Email:
 - d. Phone Number:
 - e. Date of Event:

2. *What were the overall goals and objectives of your event / program? Please outline if you feel you met the goal / objectives and how you came to that conclusion.

3. *How many people attended your event / program? Was this the outcome expected? Why / why not?

4. *How did your event / program benefit from municipal funding?

5. *Please upload copies of receipts / invoices for this project. Receipts will only be considered valid if considered eligible funding (see eligible funding criteria) and if dated after confirmation of funding received. Funds spent prior to confirmation of funding will not be considered eligible project costs. (Receipts / invoices can also be emailed directly to "staff email")

6. *Please upload photos of the event / program.

7. I certify that, to the best of our knowledge, the information provided herein is accurate and complete and is endorsed by the Organization, which I represent.

I agree and abide by the information as outlined in the **municipal grants to organization policy** and indemnify and save harmless the municipality from any and all losses, liabilities, damages, costs, claims, suits or actions arising from the provision of the program(s) identified above.

*Date:

*Signature:

Community Grant Scoring Matrix

Score each criteria out of 5

Year: _____

Applicant Name: _____

Evaluator Name: _____

| | | Points | Notes |
|---|--|--------|-------|
| Grant amount requested: | | | |
| Criteria | Scoring Criteria | | |
| 1 | The initiative will have a positive impact on the community | | |
| 2 | The initiative provides access to the arts, culture, environment, heritage, recreation, lifelong learning and/or health activities | | |
| 3 | The project, initiative or event will contribute to the economic prosperity of the Municipality of West Grey and/or promote civic pride | | |
| 4 | The initiative demonstrates broad support by way of having adequate funds and support from other sources and stakeholders and/or significant evidence of broad community support | | |
| 5 | The initiative benefits a significant number of residents | | |
| | Total Points | | |
| Consideration of full or partial grant – please note recommended amount | | | |

Scoring / Evaluation Instructions: Score each criterion out of 5 using the scale below:

Points

| | |
|---|--|
| 0 | Did not submit information for criteria |
| 1 | Does not satisfy the requirements of the criteria in any manner |
| 2 | Submission minimally addresses some, but not all of the criteria |
| 3 | Submission adequately meets most of the requirements of the criteria |
| 4 | Submission fully meets all requirements of the criteria |
| 5 | Submission exceeds the requirements of the criteria, very desirable |

