



A People Place, A Change of Pace
SHELBURNE
ONTARIO, CANADA

CORPORATE POLICY

DEPARTMENT:	ADMINISTRATION – TREASURY OFFICE
SECTION:	MUNICIPAL GRANT FUNDING POLICY
APPROVAL:	COUNCIL
POLICY NUMBER:	2016-05
EFFECTIVE DATE:	JANUARY 2016
AMENDED DATE:	JULY 24 2023 (By Resolution of Council)

1. 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 recognizing the financial constraints impacting the Town's ability to provide funding to all groups.

2. POLICY STATEMENT:

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.

3. PROGRAM INTENT & PRIORITIES

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 Grant 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 funding.

Council will, through its annual operating budget, determine the amount of funds to be allocated to the grant program. A Grant Funding Committee comprised of members of Council may be formed to review the applications and make a recommendation to Council. Council will retain the right to make the final decision on both the overall grant allocation and the individual grant.

The application requests should maximize opportunities for inclusive public participation and access. The proposed project should also align closely with council's priorities.

4. TYPES OF GRANT FUNDING:

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:** 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.
- **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.



5. FUNDING ELIGIBILITY:

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

- The organization must have been in operation for at least one full year (or 365 calendar days)
- Individuals are not eligible. Organizations should be a registered non-profit or charitable organization or partnered with one. (Partnership cannot be a municipality).
- 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. The organization must be sustainable and able to operate without this grant funding.
- 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.
- This is a competitive process, and 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.
- The organization, within the current fiscal year, must spend grant funding on the sole purpose for which it was awarded.
- Overhead or administrative costs not related to the project and capital costs (i.e. items that depreciate) are not eligible



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- The project/event cannot already be financially supported by the Town of Shelburne in another capacity (i.e. committee or board budgets).
- Applicants requesting funding should consider that any grant received by the Town will also cover any applicable membership fees of the organization that may also be requested of the applicant and membership fees will not be paid on top of grant allocation.
- Projects/events must support at least **one** of the Current Term of Councils' Strategic Priorities (current priorities included in the application document)
- The Town reserves the right to deny funding to any application that is not held within the Town of Shelburne.
- Projects must primarily benefit Town of Shelburne residents.
- The organization must be in good standing with the Town with respect to property taxes and accounts receivable.
- The organization must not be involved directly or indirectly with any ongoing litigation with the Town, its boards or committees.
- Funding Requests cannot exceed \$15,000.

6. APPLICATION INFORMATION:

All grant applications shall be directed to the Treasurer or Deputy Treasurer, at treasurer@shelburne.ca on or before August 31st of each year to ensure they are included in the review process. Only one grant request per organization per year will be considered.

All applications shall be submitted on the Municipal Grant Funding Application which includes, but is not limited to, the following information:

1. Outline the level of service the organization provides to the Town of Shelburne.
2. The amount of financial assistance being requested.



3. The degree in which the community benefits as a result of the support.
4. A proposed budget for the current year, detailing expenditures and revenues, including a list of all other grants and/or donations being sought.
5. Sponsorship funding requesters are required to include 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 and how the Town will be recognized as a sponsor.
6. Page 2 of the Municipal Grant Funding Application for Financial Support will be kept confidential as it contains personal contact information collected under the authority of the Municipal Freedom of Information and Protection of Privacy Act. The remaining pages of the Municipal Grant Funding Application will be circulated in a council agenda package for transparency and accountability purposes to the public. The Council agenda is a public document and forms part of the permanent public record. Questions about the collection of personal information should be directed to the Clerk at 519-925-2600.

7. APPLICATION REVIEW PROCESS:

Late or incomplete applications for any grants will not be forwarded for consideration to Council or the Grant Funding Committee.

Applications that are deemed complete and which are received by the August 31st application deadline will be forwarded to the Council as a Whole and/or Municipal Grant Funding Committee during budget deliberation meetings for review and consideration.

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

The granting of assistance in any one year or over several years is not to be interpreted as a commitment to future year's funding. The overall budget funding allocation for municipal grants may be increased or decreased from one year to the next within the Town's operating budget. Requesting organizations may see decreased or declined decisions depending on the total budget allocation available.



Recognizing that unique and beneficial “Special Events/Sponsorship” requests may also arise from time to time outside of the timelines 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. This will not apply to returning applicants who have simply missed the application deadline.

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.

All community organizations receiving funding or staff resources (In Kind) must agree to adhere and uphold the Town’s standard of respect, dignity, inclusion and refrain from conducting events that are perceived to be harmful and offensive to the community.

If funding or staff resources are provided to a community organization, the Town reserves the right to participate in the planning of the event and/or review the final plans and provide comments before the commencement of the scheduled event.

If the community organization receiving funding or staff resources fails to comply with the Town’s standard of conduct, it will not be eligible to receive funding and/or staff resources for future events.

8. 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 31 annually.

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



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9. PAYMENT:

The term of the 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.

Applicants requesting \$5,000 or more may be requested to provide additional supporting documentation. This does not prevent the Town from asking for additional information from any applicant.

Grant recipients will be notified in writing of the grant amount approved (if any) 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 restrictions apply to the grant - this may include quarterly payments.