



## TOWNSHIP OF MONTAGUE

### Grant/Donation Policy

Approval Date: July 18<sup>th</sup>, 2017

#### **Policy Statement**

The Township of Montague recognizes the many benefits that various registered charitable and not-for-profit groups/organizations within the Municipality provide by improving upon the cultural, social and economic well-being of the community. It is for this reason that the Municipality is committed to treating all requests for contributions in a consistent, fair and equitable manner subject to local needs, priorities and Council's approved budget.

Council also recognizes that citizens have the right to expect that tax dollars will be expended in a manner that is justifiable, fair and holds groups accessing public funds accountable for their spending.

Municipal 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 Township's ability to provide funding to these groups.

To that end, Council will include a budget figure they deem appropriate during the budget meetings. Further on in the budget process Council will determine how they will apportion this figure.

#### **Purpose**

The purpose of this policy is:

- To establish, funding criteria and application procedures for requests for financial assistance from groups and organization in the community of Montague;
- To provide council and staff with clear direction in considering and responding to requests for assistance;
- To secure an open and transparent decision-making process for requests for donations from council;
- To provide an accessible and equitable process for groups and organizations seeking donations from council;
- To establish an annual calendar for the processing of all donation requests;

- To provide a process which allows council to conduct a meaningful comparison of requests for donations;
- To provide a process which allows the council to maintain a more equitable distribution of council donations;
- To enhance council's appreciation and understanding of community groups operating in Montague Township.

In order to ensure the consistent, fair and equitable treatment of all donation requests, this policy has been developed to establish eligibility criteria and guidelines to administer such solicitations. All requests for a donation must be made through the application process as outlined in this policy. Individual departments or employees have no authority to approve/grant donations requests.

### **Application**

Council recognizes that many groups and organizations conduct events and provide programs that benefit the community. Generally, Council will consider requests for events and programs that:

- Promote the welfare of the community;
- Promote the health of the people and the community;
- Promote the education and training for people within the community;
- Promote the economic advancement of the community; or
- Promote the cultural, heritage, social, or environmental well-being of the community.

Contributions will not be made for the following purposes:

- Discriminatory activities or events or those that would incite hatred towards any group;
- Activities that are contrary to the policies of the municipality; or
- Activities which are deemed to be unlawful.

While Council will consider requests for contribution, there is no guarantee that a request will be approved.

## **Definitions**

“Delegation” – individual or group/organization appearing before Council or Committees.

“Donation” – A monetary sum given from the Township to a non-profit organization without the expectation of repayment. Can be used interchangeably with Grant.

“Non-Profit” – A not-for-profit organization that meets the criteria established in Chapter 4 “Eligibility Requirements” of the Lottery Licensing Policy Manual issued by the Province of Ontario. See Sections 2.1.0-2.1.5 and Sections 2.3.0-2.3.1 that are attached in Appendix "D". A registered charity meets these criteria. Can be used interchangeably with ‘Charity’, and ‘Not-for-Profit’

## **Types of Grants**

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

“Festival Grants” – is to assist organizations in offsetting costs for ‘new’ festivals within the township. A festival is a tourist attraction, entertainment and/or educational event for township residents. New being an event that hasn’t taken place within the last 5 years.

“In-Kind 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.

“Program Development” – objective is to enhance participation and access to recreation, cultural and social programs.

“Special Events” – are defined as any one-time or first-time event that is of cultural, social or recreational significance to the community and has the participation of one or more organization and/or an event of municipal, provincial or national significance which would be expected to bring economic and/or public relations benefit to the Municipality.

## **Announcement/Notification**

Council will invite applications for financial assistance by advertising in the local newspaper and on the municipal website during the month of October each year. To be considered for the Financial Assistance Program all applications must be completed and submitted by the deadline November 30th of each year.

Application form is available on the website at <http://www.township.montague.on.ca/> or by visiting the municipal office at 6547 Roger Stevens Drive, Smiths Falls ON.

All applicants will be notified regarding Council's decision about the application in writing. Recipient's names and amounts donated shall be made available in a report to Council, also available on the municipal website. Recipients and amounts may also be advertised in the media.

All applicants shall be notified in writing from the Clerk's office in regards to scheduling their delegation for Council.

## **Criteria**

- Preference will be given to applicants that are non-profit community groups and organizations;
- Applicants must provide the Municipality with their registration name and number on each application;
- Applications from school teams/clubs are eligible and should be endorsed or sponsored by a teacher, leader or coach;
- An organization receiving financial assistance from the Municipality should not act in the capacity of a funding body for, or make grants/donations to any other group or organization;
- The non-profit organization/group on the application must be located in the Township or serve the Township residents, or their event/program must be hosted in the township;
- Groups that have received financial assistance from the municipality in the past year shall provide a summary financial and programming report of the previous event/use of funds with each new request;
- Each application must demonstrate there is a need for financial assistance;
- Applicants must demonstrate a reasonable effort to raise funds from sources other than the Municipality;
- All applications should be accompanied by the most recent set of financial statements available at the time of application;
- Applicants will be required to a delegation to Council at least once during the year of award or application year.

Applicants must agree to acknowledge the Municipality's contribution in all publicity/promotion relating to the event or activity to which the donation applies.

### **Application Process**

- Late or incomplete applications for grants will not be forwarded for consideration
- Council will invite applications for financial assistance by advertising in the local newspaper and on the Municipal website during the months leading up to the budget meetings.
- All requests for grants must be submitted to the Clerk by the set deadline November 30<sup>th</sup>, of each year to allow appropriate time for consideration by Council and shall be made by submitting a completed "Application for Donation" with the included Budget Forms attached as Appendix "A".
- Council shall allocate an annual amount for donation purposes yearly within the municipal budget. The amount of funds shall be distributed based upon the evaluation of the requests received by the deadlines.
- No donation will be granted unless specifically authorized by Council in the form of a resolution for support or as otherwise authorized by this policy.
- In making donations the Township reserves the right to impose any conditions and restrictions that it deems fit.
- Those submissions reviewed by Council will be contacted in writing by the Clerk's office outlining the results of the review and will include any other necessary information.
- All successful applicants must complete a Post Program/Event Report Form within three months of the completion of the event, project or service. Failure to do so will remove the possibility for further funding considerations
- Any decisions made regarding the granting or refusal of a donation is final. There will be no opportunity for appeal.

## **Funding**

The applicant organization, within the current fiscal year, must spend any grant funding on the sole purpose for which it was awarded. The Township does not wish this policy to be sole source of funding therefore; all grant types will have a maximum of \$5,000.00 per application. This is to assist Council in keeping grant funding distribution equal and fair.

It will be at Council's discretion if an application receives the full amount it has requested. Council reserves the authority to award grants over and above \$5,000 at their discretion.

Grant awards up to a limit of \$1,500.00 shall be issued in full upon notification of being awarded financial assistance.

Grant awards greater than \$1,500.00 shall be paid in installments which will be detailed in the award notification letter.

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

Donations made by the Township shall not be regarded as a commitment for continued support in the future.

Any unused funding must be reported to the Township in the Post Project Report with an explanation of why it went unused. Council will determine if the unused funds must be returned to the Municipality.

In the event the event/program is cancelled, the Township must be notified immediately. Council will determine if the funds must be returned to the Municipality.

## **Exclusions**

Council may cease implementing this policy at its discretion.

**Appendix "A"**  
**APPLICATION FOR A DONTATION / GRANT**

The following application completed by the Applicant will be kept on file with the Township of Montague. Please return this application to the Township of Montague Office.

**Section I**

**1. APPLICATION ELIGIBILITY**

**a. LEGAL NAME OF THE ORGANIZATION**

Name: \_\_\_\_\_

Please list Board of Directors/Organizing Committee including addresses (or attach to the back of the application)


**b. FULL LEGAL ADDRESS**

Street/Box: \_\_\_\_\_

Town: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

**c. TYPE OF ORGANIZATION**

Circle all that apply.

Arts/Culture      Recreation/Sports      Event      Other (Specify)

Other: \_\_\_\_\_

**d. IS THE ORGANIZATION REGISTERED WITH REVENUE CANADA AS A CHARITY?**

Yes

No

Provide registration date and number.

**e. IS THE ORGANIZATION INCORPORATED AS A NON-PROFIT ORGANIZATION WITH MINISTRY OF CONSUMER AND BUSINESS SERVICES (ONTARIO)?**

Yes

No

Provide registration date and number.

**f. INDICATE YOUR ORGANIZATION'S FISCAL YEAR**

From: \_\_\_\_\_

To: \_\_\_\_\_

**g. DESCRIBE WHO YOUR ORGANIZATION SERVES, i.e. WHO IS YOUR ORGANIZATION'S AUDIENCE**


**h. DESCRIBE YOUR ORGANIZATION'S MEMBERSHIP: INCLUDE THE NUMBER OF MEMBERS AND YOUR MEMBERSHIP FEES IF APPLICABLE.**




**i. WHO IN YOUR ORGANIZATION SHOULD WE CONTACT CONCERNING THIS APPLICATION**

Name: \_\_\_\_\_

Telephone #: \_\_\_\_\_ (Daytime) \_\_\_\_\_ (Evening)

Email: \_\_\_\_\_

**j. ALTERNATE CONTACT FOR YOUR ORGANIZATION**

Name: \_\_\_\_\_

Telephone #: \_\_\_\_\_ (Daytime) \_\_\_\_\_ (Evening)

Email: \_\_\_\_\_

**k. APPLICATION SIGNATURE**

We the undersigned, declare that all information provided in and with this statement is factual and correct. \*\*Please refer to the Municipal Freedom of Information and Protection of Privacy Act Section 8.8 (1) for disclosure information.

\_\_\_\_\_  
**Print Name of Principal Officer**

\_\_\_\_\_  
**Print Name of Principal Officer**

\_\_\_\_\_  
**Signature of Principal Officer**

\_\_\_\_\_  
**Signature of Principal Officer**

\_\_\_\_\_  
**Title**

\_\_\_\_\_  
**Title**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Date**

**Section II**

**2. FUNDING DETAILS**

**a. AMOUNT OF GRANT REQUEST**

This includes the total request for financial assistance, both monetary and municipal resources – refer to Financial Assistance Section of Policy)

\$ \_\_\_\_\_

**b. SELECT THE TYPE OF PROJECT OR EVENT YOU ARE APPLYING FOR:**

- Community Event
- Festival Grant
- In – Kind
- Special Event
- Program Development

**c. BRIEFLY DESCRIBE YOUR PROJECT IN THE SPACE PROVIDED:**


**d. RECAP OF PREVIOUS YEAR’S ACTIVITIES:**

Please list and describe the specific programs and services delivered by the Organization.


**e. FUNDING RECAP OF PREVIOUS GRANT(S):**

**i. Did your organization receive any grants from the Municipality in the last year?**

Yes

No

**ii. If YES please indicate the year, amount and event/program name.**

Year: \_\_\_\_\_

Amount: \$ \_\_\_\_\_

Program/Event Name: \_\_\_\_\_

**iii. How did your organization use the funding noted above?**


**iv. Did you receive funding from sources other than the municipality last year?**

Yes

No

**v. If YES indicate the source of funding and amount (i.e. service club, local organization, provincial/federal grants).**

If more space needed please attach it to the back of the application.

<b>SOURCE</b>	<b>AMOUNT</b>

**3. PROJECT/EVENTS DETAILS**

**a. BRIEFLY DESCRIBE YOUR PROJECT/EVENT**


**b. LOCATION THE PROJECT/EVENT WILL BE TAKING PLACE**

Please fill in all applicable information.

Street: \_\_\_\_\_

Town/Township: \_\_\_\_\_ Province: \_\_\_\_\_

**c. BRIEFLY EXPLAIN HOW THIS WILL SERVE THE RESIDENTS OF THE TOWNSHIP OF MONTAGUE**


**d. TELL US HOW THE MUNICIPAL FUNDING YOU HAVE REQUESTED WILL BE USED:**

**i. How will the grant assist your activities?**


**ii. What goals do you wish to achieve?**


**iii. How will the grant be disbursed by the organization; i.e. What costs will you use the grant for?**


**e. TELL US HOW YOU PLAN TO ACKNOWLEDGE THE TOWNSHIP OF MONTAGUE**




## FINANCIAL ASSISTANCE PROGRAM – APPLICATION PROJECT / EVENT BUDGET SUMMARY

Please complete the following form specifically summarizing project or event budget.

### PLEASE FILL ONLY PORTIONS THAT APPLY

Project/Event Timeframe	From (date):		To (date):		
<b>Earned Revenue</b>	<b>\$ Amount</b>	<b>Fundraising</b>	<b>\$ Amount</b>	<b>Expenditures</b>	<b>\$ Amount</b>
Subscriptions		Donations		Salaries	
Admissions		Grants		Production/Exhibition	
Service Fees		Other (Specify)		Office/Administration	
Memberships		Total Fundraising Revenue <b>(B)</b>		Marketing	
Workshops		<b>Revenue from Governments</b>	<b>\$ Amount</b>	Equipment	
Bar/Food/Concessions /Etc.		Township of Montague		Transportation	
Endowment/Bank Interest		Other Municipalities		Supplies	
Other (Specify)		Provincial		Subsidy	
		Federal		Other	
		Other (Specify)			
<b>Total Earned Revenue (A)</b>		<b>Total Government Revenue (C)</b>		<b>Total Expenditures (D)</b>	



**FINANCIAL ASSISTANCE PROGRAM – APPLICATION PROJECT / EVENT BUDGET SUMMARY**

Please complete the following form specifically summarizing project or event budget.

**PLEASE FILL ONLY PORTIONS THAT APPLY**

<b>BUDGET OVERVIEW</b>	<b>Project/Event Revenue</b>	<b>\$ Amount</b>	<b>Total Expenditures (D)</b>	<b>\$ Amount</b>
	Total Earned Revenue <b>(A)</b>			
	Total Fundraising Revenue <b>(B)</b>			
	Total Government Revenue <b>(C)</b>		<b>Surplus (Deficit) E – D</b>	<b>\$ Amount</b>
	Total Project/Event Revenue <b>(Add A+B+C=E)</b>			

**Appendix "B"**  
**POST PROGRAM / EVENT REPORT FORM**

This report form must be completed within three (3) months of the completion of the event/program. Any organization that does not complete and return this form will not be considered for future funding. Please return this to the Township of Montague office.

**1. BASIC INFORMATION**

**a. ORGANIZATION INFORMATION**

Name of Organization: \_\_\_\_\_

Street Address: \_\_\_\_\_

Town: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Telephone #: \_\_\_\_\_

**b. CONTACT PERSON**

Name: \_\_\_\_\_

Telephone: \_\_\_\_\_ (daytime) \_\_\_\_\_ (evening)

Email: \_\_\_\_\_

**c. AMOUNT**

Amount Requested: \$ \_\_\_\_\_

Amount Received: \$ \_\_\_\_\_

If applicable, Amount Unused: \$ \_\_\_\_\_

Reason for the funding going unused:


**d. GRANT PURPOSE**

If the type was 'Other' please specify.

Type of Grant: \_\_\_\_\_

**2. EVENT DETAILS**

**a. DATE AND LOCATION OF EVENT/PROGRAM**

**b.**

Event/Program Date: \_\_\_\_\_

Location of Event/Program: \_\_\_\_\_

If the location was postponed please explain why in the space provided below.


**c. EVENT DESCRIPTION**

Please include a brief description of the event/program for which the organization is reporting on.


**d. SUCCESS OF EVENT**

**i. Describe how anticipated goals and objectives were met including performance measurements.**


**ii. How many people participated in or attended the event/program? How many paid attendees? What was the age and regional breakdown of attendees?**


**iii. Describe how the greater community benefitted including both short term and long term positive outcomes to the municipality. (outcomes should be communicated in a public way)**


iv. Was the event/program a success? How was the success measured? If not a success, describe why not.


**3. FUNDING**

**a. HOW THE FUNDING ASSISTED**

Briefly describe how the funding from the Municipality assisted overall in the operation of your organizations event/program.


**b. HOW MONEY WAS SPENT**

Briefly describe how the funding was allocated for your event/program.


**4. ATTACHMENTS**

**a. MARKETING/ADVERTISING/PROMOTIONAL**

Please attach copies of any marketing, advertising or promotional materials acknowledging the support of the Municipality for the event or program for which the funding was received from the Municipality.

**b. FINAL STATEMENT OF OPERATIONS**

Please attach a copy of the final statement of operations (a summary of a company/organization’s revenues and expenses over the reporting period) for the event. If your final statement indicates a profit, please include a statement of how these funds will be utilized.

**5. DECLARATION**

We, the undersigned, declare that we have been authorized to file this report and that to the best of our knowledge, all answers provided in the report, as well as all the information contained in the document and materials attached to it, are true and complete.

\_\_\_\_\_  
**Print Name**

\_\_\_\_\_  
**Print Name**

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Title**

\_\_\_\_\_  
**Title**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Date**

**APPENDIX "C"**  
**DONATION REQUEST EVALUATION CHECKLIST**

This evaluation checklist is for Staff/Council use only.

Date Application Received: \_\_\_\_\_

Criteria	Yes	No
Application form complete (with all necessary information provided)		
Budget form complete (with all necessary information provided)		
Application received by the Deadline.		
Application meets policy criteria.		
Organization/Group based within, operating within, or serving the Township of Montague		
Event/Program occurring within the Township of Montague		
Event/Program benefitting residents of the Township of Montague		
Organization/Group a registered Charity/Non-Profit		
Donation Type clearly indicated		
Organization/Group has received prior assistance from Township		
Organization/Group receiving assistance from other sources		
Satisfactory Township acknowledgement if donation provided		
All requested attachments included with application form		

What type of donation/grant is being requested? \_\_\_\_\_

Approximate donation value being requested: \_\_\_\_\_

Will the event/program being hosted contribute to promoting and improving the cultural, recreational, social and economic well-being of Township residents?

- Yes  No

Does this application meet all criteria necessary to be forwarded to Council?

- Yes  No

Has the organization been contacted to schedule their designation?

- Yes  No

If yes, the planned date: \_\_\_\_\_

Evaluator Name (Print): \_\_\_\_\_

Evaluator Signature: \_\_\_\_\_

Date Evaluated: \_\_\_\_\_

## **APPENDIX "D"**

Chapter 4 "Eligibility Requirements" of the Lottery Licensing Policy Manual issued by the Province of Ontario. See Sections 2.1.0-2.1.5 and Sections 2.3.0-2.3.1 below.