



THE CORPORATION OF THE TOWN OF WASAGA BEACH
POLICY MANUAL

SECTION NAME: FINANCIAL MANAGEMENT	POLICY NUMBER: 4-5
POLICY: Grants and Sponsorships to Organizations Policy	REVIEW DATE: February 1, 2027
EFFECTIVE DATE: January 27, 2022	REVISIONS:
APPROVED BY BY-LAW: 2022-03	ADMINISTERED BY: Director, Finance & Treasurer

PURPOSE

The purpose of this policy is to establish criteria and guidelines for providing grants or sponsorships for municipally owned resources to non-profit organizations that enhance the well-being of the community and,

- are within the municipality; or
- can demonstrate that they enhance the well-being of the Wasaga Beach Community; or
- are individuals in the community that are involved in projects that improve the community of Wasaga Beach.

Council recognizes the valuable contributions of volunteers and community organizations and agencies on behalf of its citizens to enhance the community. The provision of grants or municipal owned resources demonstrates Council's commitment to working with groups that provide 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 these groups.

SCOPE

This policy applies to registered non-profit organizations, elementary and secondary schools, or other organizations that provide financial support to organizations who demonstrate they can deliver programs, events or activities that will benefit all citizens of Wasaga Beach and individuals that provide services or undertake projects that benefit the Town's community.

DEFINITIONS

Grants – Applications for grant support from the Town’s budgeted “Grants to Organizations” line item. The grant program is advertised in the fall prior to the upcoming budget year for application submissions to the program.

Sponsorships – Applications for Town sponsorship funding is taken from the Town’s “External Event Sponsorship” Budget. The sponsorship program is advertised in the fall prior to the upcoming budget year for submissions to the program. Additionally, the sponsorship program information is included within the Special Event Permit Application and in-year requests may receive consideration if budgeted funding is available.

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.

Contributions will not be made for the following purposes:

- Discriminatory activities or events or organizations that may incite hatred towards any group;
- Activities that are contrary to the policies of the Municipality;
- Activities which are deemed to be unlawful;
- Where other identifiable funding sources may be available.

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

FINANCIAL ASSISTANCE

Includes requests for monetary contribution as well as municipally owned resources outlined as follows:

Municipally owned resources eligible for grants and sponsorships include:

- Use of a municipally owned facility (rental fee waived/reduced);
- Municipal staff support (expertise) for an event (wages waived/reduced);
- Use of municipally owned equipment or services (fees waived/reduced);
- Use of municipally owned materials (rental fee waived/reduced); and
- Use of municipally owned property (rental fee waived/reduced).

PROGRAM INTENT

Each year the Municipality often receives more grant or sponsorship requests than is within in the allocated budget. The objective of this policy is to treat all organizations fairly and consistently. The aim of the “Municipal Grants and Sponsorship Program” 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.

As part of its annual budget process, Council will determine the amount of funding available that will be provided for all municipal grants and sponsorships. Further, Council will retain the right to make the final decision on both the overall funding allocation and the individual grant or sponsorship.

TYPES OF GRANTS/SPONSORSHIPS

The different types of grants/sponsorships awarded under the Municipal Grants and Sponsorship Program are as identified:

“Community Organization” grants are defined as grants intended to assist with the purchase of a capital item that will assist the organization in the delivery of its programs. This type of funding is only available through the grant application.

“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. This type of funding is available through either the grant or sponsorship applications.

“Special Events” are defined as any one-time or first-time event that is of cultural, social, tourism or recreational significance to the community and which may have the participation of more than one 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 Town. This type of funding is available through either the grant or sponsorship applications. The sponsorship application is more suitable for larger event programs.

“Community Event” is defined as a recurring event that Council has determined provides some significant benefit to the broad community and the event is open to all members of the public. This type of funding is available through either the grant or sponsorship applications. The sponsorship application is more suitable for larger community event programs.

FUNDING ELIGIBILITY

An applicant organization must meet the following general criteria in order to be considered for a grant or sponsorship from the Town:

- Applicants must be non-profit community groups and organizations that have been in existence for a minimum of three months;
- Applicant organizations must be governed by a community-based volunteer Board of Directors who must provide a letter of confirmation demonstrating approval of the proposal;
- Applications by individuals must indicate support from a community-based non-profit unincorporated association and must provide the association's charter, constitution, or articles of association, whichever the organization uses. Absence of such a document will make the individuals application in-eligible for a grant;
- 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, historical, and recreation and/or healthy living activities;
- Each application must demonstrate there is a need for financial assistance, that adequate funding from other sources is not available, and the benefits to the community;
- The applicant must demonstrate its' commitment to accessibility, effectiveness, and accountability through sound management and financial practices;
- The applicant or individuals organizing an event must not be involved in a dispute with the Town on any matter or owe monies to the Town; and
- Grants and sponsorships shall be used only for the purposes approved by Council. The recipient shall notify Council of any proposed material changes to the nature of or budget for, the activities for which the grant or sponsorship has been made and shall use the grant or sponsorship for such altered activities only with the prior consent of Council.

TERMS & CONDITIONS

- The recipient shall repay the whole or any part of the grant or sponsorship, as determined by the Town, if the recipient:
 - Ceases operations;
 - Ceases to operate as a non-profit organization;
 - Has knowingly provided false information in its application;
 - Uses funds for purposes not approved by Council; or
 - Breaches any of these terms and conditions.
- Any unused portion of a grant or sponsorship remains the property of the Town of Wasaga Beach. If any unused portion has already been paid to the recipient, it shall be repaid by the recipient upon request from the Town.
- Funding will not be provided for accumulated deficits or funding shortfalls of any organization.
- The applicant organization, within the current fiscal year, must spend any grant or sponsorship funding on the sole purpose for which it was awarded.

APPLICATION

- Annually, the Town will advertise both on the website and through the local newspaper that it will be receiving applications for grants and sponsorships.
- All grant and sponsorship applications shall be directed to the Treasurer by the date noted in annual advertisement each year.
- Only one grant request per organization will be considered.
- All applications responding to the advertised call for submissions shall be submitted on the Municipal Grant and Sponsorship Program Application form together with the following information and documentation:
 1. The organizations legal non-profit name;
 2. The organizations purpose, function and the service it provides to the community;
 3. The amount of financial assistance required;
 4. The benefits in the community resulting from the grant or sponsorship;
 5. Financial statements from the immediate preceding fiscal year;
 6. Listing of the current Board of Directors, including addresses and phone numbers.
- In addition to the above list, sponsorship applications shall include the following information;
 1. Anticipated attendance;
 2. Specific information about what the funding will be used for such as marketing, hiring of entertainment, etc.;
 3. Where marketing will be taking place and by what means (i.e. Print, Digital, Radio, etc.) Recognition of the Town's funding must be made in all marketing (i.e. approved logo placement on posters) as well as during the event (i.e. strategically placed banners, verbally to the attendees, etc.);
 4. Anticipated budget of the event;
 5. Names of individuals and organizations involved in organizing the event;
 6. Organization website address and all social media accounts.

APPLICATION REVIEW PROCESS

- Grant applications will be processed by the Treasurer through the Grant Policy procedures. The grant application program closes after Council has determined the grants to be approved for the budget year.
- Late or incomplete grant applications may not be processed for consideration.
- Completed grant applications for Community Organization grants, Special Event and Community Event grants (as defined by this policy) which are received by the advertised deadline will be forwarded to one of the Committee Council meetings for review and consideration based on available budgeted funds.
- Sponsorship applications will be processed by the Senior Special Events Coordinator. For sponsorship applications received with the annual advertised call for submissions (that have been marked on the application in the box noted for

sponsorship application) the Treasurer will forward these applications to the Senior Special Events Coordinator for processing.

- In-year sponsorship application requests (submitted after the due date in the advertised annual call for submissions) are to be directed to the Senior Special Events Coordinator for consideration.
- Completed sponsorship applications for Special Event and Community Event sponsorships (as defined by this policy) which are received either by the advertised deadline, or during the budget year, will be forwarded to one of the Committee Council meetings for review and consideration in tandem with reports from staff recommending special event approval specifics including recommended amounts of sponsorship funding.
- In considering grant and sponsorship applications, Council will evaluate applications in terms of general and financial criteria and principles outlined in this policy and may interview or ask any groups to make a presentation with final recommendations based on the total grant or sponsorship allocation and approval of individual grants or sponsorships.
- Granting of assistance in any one year or over several years is not to be interpreted as a commitment to future years' funding.
- Applications for In-Kind non-financial assistance will be forwarded to the respective department for review with a report to the respective Standing Committee of Council for consideration and Council for approval.
- Grant and sponsorship applications determined to be ineligible for funding shall be notified, in writing, of Council's decision.

PAYMENT

- The term of a grant or sponsorship shall be for one year only unless Council has endorsed a multi-year commitment;
- Renewals are not automatic nor are any increase in funds;
- Grant and sponsorship recipients will be notified in writing of the amount approved following Council approval of the Town's annual budget and Council's separate approval of the application(s); and
- Payments for approved grant applications shall be made following the Council meeting ratifying approval of the grants, as soon as is reasonable for the Treasury Department to process. All approved grant applicants receiving funding will be required to submit a report to the Treasurer by December 31st of the grant budget year. The report is to include a short summary of how the funds were used and the benefits derived. Additionally, the report will include a financial breakdown of the spending of the funds and submitted along with the report the invoices/cancelled cheques to support the expenditures. Failure to submit the report may render the organization in-eligible for future grants from the program.
- Grants may be awarded with certain terms and conditions. The letter of award will state, if any, particular restrictions that apply to grant.
- Payments for Special Event and Community Event sponsorships will be made upon completion of the event, after the post event report and invoices are submitted to staff justifying the parameters outlined in the application. Applicants may request on

their application a payment sequence exception justifying why they require some funding before the event is held. Staff will consider requests and may provide up to 50% of the awarded funding before the event and the balance of the awarded funding in line with the review of a post event report, invoices, and parameters outlined in the application.

REQUESTS FOR ASSISTANCE OUTSIDE SCOPE OF POLICY

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

POLICY REVIEW AND PROCEDURE

This Policy will be reviewed as required, but in any case no later than five (5) years from the date of the most recent review.

The Treasurer will be responsible for initiating the review of this Policy.

ATTACHMENTS

Application form attached