

## PURPOSE

The purpose of the policy is to:

1. provide a framework for the fair and transparent disbursement of public funds;
2. ensure that all community organizations are treated fairly and equitably;
3. minimize administrative hurdles and encourage consistency and standardization in the application process and,
4. provide council and staff with guidance on appropriate expenditures, record keeping and reporting of expenses related to municipal grants.

## SCOPE

Any community organization that applies for and/or receives financial assistance from the Municipality under any established grant program is subject to this policy. Funding provided to primary and secondary schools within Victoria County are also subject to this policy.

All staff and council involved in the administration and/or approval of municipal grants must adhere to the policy statements contained within this document.

Inter-municipal agreements, annual fire department operational funding, tax exemptions for registered charities and residential property tax rebates are not applicable under this policy.

## POLICY

### DEFINITIONS

**'Application'** shall mean the formal application form developed by the Municipality, specific to the grant program from which funds are being sought.

**'Community organization'** shall mean an organization that is either incorporated as non-profit or a registered charity as defined by the Canada Revenue Agency

**'Council'** shall mean the Municipal Council of the Municipality of the County of Victoria.

**'Grant'** shall mean an award of financial or in kind assistance by the Municipality to an eligible organization; does not include monies transferred as part of a contract for service.

**'Municipality'** shall mean the Municipality of the County of Victoria.

### GENERAL

The aim of any grant program within this policy is to provide a modest level of support and assistance to community organizations within the Municipality. This support is in recognition of the value that these

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groups provide to the well-being, sustainability and growth of our communities and to encourage citizen involvement.

## **AVAILABILITY**

On an annual basis, Council shall identify amounts to be allocated for grants as part of the budgeting process.

Grant funding disbursed in accordance with this Policy shall not exceed 4% of the total revenue collected by the Municipality through taxes.

Council may set aside a portion of the funding allocated to grant programs to be used for requests of a special nature.

## **AUTHORITY**

Approvals for development, capital, and operating grants and scholarship funding under this policy shall be given by Council.

Approvals for tourism related initiatives under this policy shall be administered by the Tourism and Development Officer.

Approvals for recreation and physical activity related initiatives, including school recreation, under this policy shall be administered by the Recreation and Physical Activity Coordinator.

## **FUNDING CONDITIONS**

In general, grant applicants should not expect the Municipality to be the sole source of project funding. The Municipality is interested in ensuring that organizations have other sources of funding or external partners to support projects, programs, etc.

In certain cases the Municipality may make municipal contributions contingent on other levels of government support or partnerships.

Funding from other municipal programs must be identified. Financial assistance from other municipal sources may make applications ineligible for specific grant.

Funding requests for grants are considered for one fiscal year at a time unless otherwise specified within a specific grant program.

Any funding approval that is contingent on certain terms and conditions shall be communicated to the applicant in writing with an associated timeline to satisfy said terms and conditions. Funding may be revoked for failure to comply with the terms and conditions stipulated.

Funding may be revoked should there be a misappropriation of funds, failure to report when requested, or misrepresentation by the receiving organization.

All applications will be pre-screened for debt owing to the municipality. Organizations that are currently in a delinquent position for property taxes and/or utility bills will have their application deemed ineligible for consideration until delinquencies are settled.

Any community organization that receives grant funding from the Municipality shall recognize the Municipality as a partner (where applicable).

Applicants are required to secure and maintain appropriate insurance coverage. Proof of insurance may be requested by the Municipality.

### CRITERIA

Applications will be accepted from organizations that:

- Have submitted complete applications by the deadlines;
- Have fulfilled any obligations outstanding from previous grant awards;
- Have provided proof of non-profit status.

Applications will not be accepted from:

- For-profit businesses;
- Organizations with political affiliations;
- Organizations where services/activities include the promotion and/or required adherence to a faith;
- Provincial/national organizations unless a local chapter exists to service the residents of Victoria County.

Priority will be given to community organizations that provide programs or services within the Municipality, or to a significant number of residents of the Municipality.

Community organizations may apply for assistance through more than one grant program providing that the applications pertain to separate and distinct projects, programs or initiatives.

Applications received after the application deadline shall be considered the following year unless there is an urgent need and the request is within the remaining budget for such grants.

Criteria specific to each grant program can be found in the appendices of this policy.

### GRANT CATEGORIES

1. **Development** - To provide one time financial support to fund or sponsor an event, program, project or activity that enhances, supports, promotes, informs/educates, celebrates, preserves and/or provides access to:
  - a. Arts/Culture/Community Heritage
  - b. Community Beautification/Environmental Sustainability
  - c. Community Health and Wellness
  - d. Youth/Seniors Supports
  - e. Tourism/Economic Development

2. **Capital** - To provide onetime support for the purchase of property, the construction, remodeling or expansion of a facility, or purchase of equipment.
3. **Operational** - To provide grants to community organizations that have a mandate to deliver an ongoing service or program that is generally delivered by a municipality, or complements a service being offered by the Municipality.
4. **Recreation/Physical Activity**– To provide grants to community organizations that are offering program or services that support the goals and objectives identified in the Municipality’s Recreation and Physical Activity Strategy. The focus of these grant programs may change from year to year.
5. **Tourism** - To provide grants to community organizations that are offering program or services that support the goals and objectives identified in the Municipality’s Tourism Strategy. The focus of these grant programs may change from year to year.
6. **School Recreation** – To provide grants to primary and secondary schools within Victoria County for the purpose of recreational program opportunities to its students.
7. **Scholarships** - To provide financial awards to Victoria County residents graduating from high school and attending a recognized post-secondary program.

## APPLICATION PROCESS FOR DEVELOPMENT, CAPITAL AND OPERATING GRANTS

The deadline for grant applications shall be identified annually. Applications will be made available online and will include the deadline.

Only one application per community organization may be submitted in each fiscal year for each funding category; however, applications should pertain to separate and distinct projects, programs or initiatives.

Organizations should not expect funding to be awarded each fiscal year. Preference will be given to organizations who have not received funding within the last fiscal year.

Applications for grant funding must include:

- Completed application form
- Proof of active registration as a non-profit or charitable organization
- Most recent financial statements or Treasurer’s Report
- A budget outlining expenses and revenues for the proposed project, program or service.

Incomplete applications will not be considered for funding. Further information may be requested as required.

All development, capital and operating grant applications received throughout a current year will be referred to the budget process of next fiscal year. Applications will be compiled by staff and circulated to Council for evaluation.

Final decisions on grants will be made upon approval by Municipal Council as part of the annual operating budget process. Each applicant shall be notified in writing of the decision.

Application requirements specific to each grant program can be found in the appendices of this policy.

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## APPLICATION PROCESS FOR RECREATIONAL/PHYSICAL ACTIVITY AND TOURISM

On an annual basis as part of the budgeting process, Council shall identify amounts to be allocated for tourism grants and for recreation/physical activity grants.

The responsible staff person identified in the Authority section above will be responsible for determining specific grant programs for the fiscal year. The focus of these grant programs may change from year to year and will support the goals and objectives identified in the Municipality's Recreation and Physical Activity and Tourism Strategies.

Applications will be made available online and will include program specific deadlines.

Only one application per community organization may be submitted in each fiscal year for each funding category, however, additional applications can be made pertaining to other separate program categories, distinct projects, or initiatives.

Applications for grant funding may include:

- Completed application form
- Proof of active registration as a non-profit or charitable organization
- Most recent financial statements or Treasurer's Report
- A budget outlining expenses and revenues for the proposed project, program or service.

Incomplete applications will not be considered for funding. Further information may be requested as required.

In general, grant applications will be considered for these categories on an on-going basis throughout the fiscal year unless otherwise identified.

Application requirements specific to each grant program can be found in the appendices of this policy.

## APPLICATION PROCESS FOR SCHOOL RECREATION

On an annual basis as part of the budgeting process, Council shall identify an amount to be allocated for primary and secondary schools within Victoria County for the purpose of providing recreational program opportunities to its students.

Each fall the Recreation/Physical Activity Coordinator will provide eligible schools with an application form to detail funding requirements for recreational programming for the upcoming school year.

Applications will be evaluated by the Recreation/Physical Activity Coordinator and funding shall be allocated based on demonstrated need in an equitable manner.

## APPLICATION PROCESS FOR SCHOLARSHIPS

The Municipality has established three annual scholarships to be offered to students that are residents of Victoria County are attending a recognized post-secondary program.

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Eligible schools will be provided the funds in May of each year. The selection process will be the responsibility of the school's selection committee, keeping in mind the criteria below. Schools must report back to the Municipality the names of the recipients of the awards.

### **Victoria County Bursary**

\$500 granted to a student attending a recognized post-secondary program on the basis of the student's financial need.

One bursary will be available for each high school in Victoria County as well as one for any high school that has a Victoria County resident as a graduating student.

### **Dr. Roland Genge Scholarship**

\$500 granted to a student attending a recognized post-secondary program in the health care field.

One scholarship will be available for each school: 'Baddeck Academy' and 'Rankin School of the Narrows'.

### **Dr. Carlyle Chow Scholarship**

\$500 granted to a student attending a recognized post-secondary program in the health care field.

One scholarship will be available for each school: 'Baddeck Academy' and 'Rankin School of the Narrows'.

## **POST GRANT REPORTING**

The Municipality shall require any recipient of grant funding (excluding scholarships) to confirm that funds received were used as described in the grant request -by submitting a follow-up report.

Organizations who fail to complete requested reporting shall be ineligible for future funding until the conditions of funding are satisfied.

Specific reporting requirements will depend on the grant program and can be found in the appendices of this policy.

## **PUBLISHING OF ANNUAL GRANT RECIPIENTS**

The Municipality shall publish annually a list of the recipients and amounts of grants made by the Municipality as required under section 65C of the *Municipal Government Act*.

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## APPENDIX I: DEVELOPMENT GRANT

### Objective

To provide one time financial support to fund or sponsor an event, program, project or activity that enhances, supports, promotes, informs/educates, celebrates, preserves and/or provides access to:

- a. Arts/Culture/Community Heritage
- b. Community Beautification/Environmental Sustainability
- c. Community Health and Wellness
- d. Youth/Seniors Supports
- e. Tourism/Economic Development

### Additional Application Requirements

Applications should include a letter of support from relevant municipal staff member (i.e. Tourism and Development Officer, Recreation and Physical Activity Coordinator, Senior Safety Coordinator, etc.)

Funding applications cannot exceed a maximum of one-third (1/3) of the total project cost. The maximum amount eligible per request is \$10,000.

### Evaluation Criteria

- Merit of the event/program/project/activity
  - o The extent to which the organizers have communicated a solid vision and goals for the event/program/project/activity which supports the purpose of a development grant.
  - o The extent to which the event/program/project/activity does not duplicate other community event/program/project/activity.
  - o The extent to which residents of the Municipality will directly benefit from the event/program/project/activity.
- Economic/Community Impact
  - o The extent to which the economic and community benefits to the Municipality have been assessed and described.
  - o The extent to which the event/program/project/activity promotes economic activity in the Municipality and/or promotes the Municipality as a destination for visitors.
- Financial Need
  - o Demonstrated need for financial assistance from the Municipality.
  - o Demonstrated efforts to seek other funding sources.
- Organizational Effectiveness
  - o Applications indicate a well-planned and organized event/program/project/activity.
  - o Organization has a solid leadership structure.
  - o Organization operates with a clear mandate.
  - o Budgets are well developed.

### Reporting

All recipients of development grant funding must submit a final report including financials to confirm that the funds were used as described in the grant application and to evaluate the success of the event/program/project/activity. This report must be submitted to the municipality within sixty (60) days of the conclusion of the event/program/project/activity.

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## APPENDIX II: CAPITAL GRANT

### Objective

To provide one time support for the purchase of property, the construction, remodeling or expansion of a facility, or purchase of equipment.

### Additional Application Requirements

If the application is for property/facility improvements, the applicant must hold the deed/lease to the property/facility or acceptable alternative (if relevant).

Applicants are responsible for securing any permits required for the completion of the work.

It is strongly encouraged that applications include quotes for capital improvements or the purchasing of equipment to streamline the evaluation process.

Funding applications cannot exceed a maximum of one-third (1/3) of the total project cost. The maximum amount eligible per request is \$20,000.

Council may consider a multi-year funding option for a capital grant.

### Evaluation Criteria

- Relevance of Capital Expenditure
  - o The extent to which the capital project/purchase enhances an organization's ability to offer a service that is generally delivered by a municipality, or complements a service being offered by the Municipality.
  - o The extent to which residents of the Municipality will directly benefit from the capital project/purchase.
  - o The extent to which the capital project/purchase enhances the quality of life for residents of the Municipality.
  - o The extent to which the benefits of the capital project/purchase are broad and not specific to a special interest group.
- Financial Need
  - o Demonstrated need for financial assistance from the Municipality.
  - o Demonstrated efforts to seek other funding sources.
- Organizational Effectiveness
  - o Group has a solid leadership structure.
  - o Group operates with a clear mandate.
  - o Budgets are well developed.

### Reporting

All recipients of capital grant funding must submit a final report including receipts to confirm that the funds were used as described in the grant application. This report must be submitted to the municipality within sixty (60) days of the conclusion of the capital work or following the completion of the capital purchase..



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## APPENDIX III: OPERATIONAL GRANT

### Objective

To provide grants to community organizations that have a mandate to deliver an ongoing service or program that is generally delivered by a municipality, or complements a service being offered by the Municipality.

### Additional Application Requirements

Operating grants are not intended to support permanent full-time staff salaries or wages.

Although an organization may receive an operating grant several times, this does not carry the guarantee of renewal over several years.

The maximum amount eligible per request is \$10,000.

### Evaluation Criteria

- Relevance of service
  - o The extent of which the organization offers a service that is generally delivered by a municipality, or complements a service being offered by the Municipality.
  - o The extent to which residents of the Municipality will directly benefit from the service.
  - o The extent to which the service enhances the quality of life for residents of the Municipality.
  - o The extent to which the benefits of the service are broad and not specific to a special interest group.
- Financial Need
  - o Demonstrated need for financial assistance from the Municipality.
  - o Demonstrated efforts to seek other funding sources.
- Organizational Effectiveness
  - o Group has a solid leadership structure.
  - o Group operates with a clear mandate.
  - o Budgets are well developed.

### Reporting

All recipients of operational grant funding must submit a final report including complete financials.

Receipts may be requested to support the final report. This report must be submitted to the municipality within sixty (60) days of the conclusion of the capital work or following completion of the capital purchase.

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## APPENDIX IV: RECREATION/PHYSICAL ACTIVITY AND TOURISM GRANTS

### Objectives

*Recreation/Physical Activity Grants:* To provide grants to community organizations that are offering program or services that support the goals and objectives identified in the Municipality's Recreation and Physical Activity Strategy. The focus of these grant programs may change from year to year.

*Tourism:* To provide grants to community organizations that are offering program or services that support the goals and objectives identified in the Municipality's Tourism Strategy. The focus of these grant programs may change from year to year.

### Additional Application Requirements

On an annual basis as part of the budgeting process, Council shall identify amounts to be allocated for the purpose of developing the year's tourism grant programs and recreation/physical activity grant programs.

The focus, application requirements, and timeframes for specific grant programs will be determined annually by the authorized staff member (i.e. Tourism and Development Officer or Recreation and Physical Activity Coordinator)

### Evaluation Criteria

The evaluation criteria for the grant programs will be determined annually by the authorized staff member (i.e. Tourism and Development Officer or Recreation and Physical Activity Coordinator).

### Reporting

Specific reporting requirements for the grant programs will be determined annually by the authorized staff member (i.e. Tourism and Development Officer, Recreation and Physical Activity Coordinator); however, they will normally include a final report and the submission of receipts/cancelled cheques/etc.

## ROLES AND RESPONSIBILITIES

Title	Role	Responsibilities
<b>Policy Editor</b>	Chief Financial Officer	<ul style="list-style-type: none"> <li>▪ Ensure policies in their care and control are always up-to-date, reviewed according to defined review frequency, or sooner (if necessary)</li> <li>▪ Draft new or edit existing policy content</li> <li>▪ Be able to interpret and explain policy content</li> <li>▪ Ensure policy documents are branded and any supporting documents (i.e. applications forms) are also branded and content consistent is with the policy</li> <li>▪ Ensure policy content is relevant and accurate</li> <li>▪ Seek and secure approval recommendation of the policy from the Policy Owner</li> <li>▪ Seek and secure approval of the policy from the appropriate Approver; and,</li> <li>▪ Provide the final approved policy document to the Administrative Assistant</li> </ul>
<b>Policy Owner</b>	Chief Financial Officer	<ul style="list-style-type: none"> <li>▪ Provide oversight to ensure policies in their care and control are always up-to-date, reviewed according to defined review frequency, or sooner (if necessary) by the assigned Policy Administrator</li> <li>▪ Be able to interpret and explain policy content</li> <li>▪ Provide oversight to ensure policy documents are branded and any supporting documents (i.e. application forms) are also branded and content consistent with the policy</li> <li>▪ Provide oversight to ensure policy content is relevant and accurate</li> <li>▪ Review the policy and make recommendation for approval to the appropriate Approver; and,</li> <li>▪ Ensure that the final approved policy document has been provided to the Administrative Assistant</li> </ul>
<b>Policy Approver</b>	Council	<ul style="list-style-type: none"> <li>▪ Review Policy recommendations for approval consideration (approve, reject or edit)</li> </ul>
<b>Policy Administrator</b>	Administrative Assistant	<ul style="list-style-type: none"> <li>▪ Facilitate an annual Policy Review; and,</li> <li>▪ Ensure final approved policies are maintained, stored and posted where appropriate</li> </ul>
<b>Target Audience</b>	Employees	<ul style="list-style-type: none"> <li>▪ Notify the Policy Owner of changes to be considered</li> <li>▪ Notify the Policy Owner when the policy becomes out of date or obsolete</li> <li>▪ Follow the Policy</li> </ul>

## REVIEW FREQUENCY

Review Frequency	Review Month
Every 2 years	January

## RELATED DOCUMENTS

Document Name
Municipal Government Act
Municipality's Recreation and Physical Activity Strategy
Municipality's Tourism Strategy

## VERSION LOG

Change Date	Description	Editor	Approver	Approval Date
January 20, 2020	Policy created	Alix Redden		
January 29, 2020	Policy brought to council for review	Alix Redden		
February 6, 2020	Feedback from council and Audit Committee member addressed	Alix Redden		
March 9, 2020	Policy approved by council	Alix Redden	Council	March 9, 2020