



Town of Shelburne

# *Municipal Grant* Funding

December 12, 2022



# ***History of Municipal Grant Funding Process***

---

## **Prior to 2016**

---

Council received sporadic Applications throughout the year making it difficult to budget and to remain accountable to the taxpayer

## **Policy Adopted 2016**

---

Senior Management would review applications for eligibility and recommend distribution to Council during Budget Process

## **Transparency**

---

With an increase in the number and types of applications, Staff turned the review process over to Council for the 2019 Intake

## **2019 Motion**

---

Council passed a motion setting standards for events:

- Respect
- Dignity
- Inclusion
- Non-offensive

## **Presentations**

---

With the 2020 Intake - applicants were asked to present their application to Council and answer any questions



# ***Municipal Grant Funding Process***

## ***Purpose & Policy***

### **Purpose**

The Town recognizes the valued contributions being provided by volunteer efforts.

Demonstrates Council's commitment to working with community groups while at the same time recognizing the financial constraints impacting the Town's ability to provide funding.

### **Policy**

Establishes eligibility guidelines, monitoring requirements. Preference will be given to those that demonstrate sound business practices, efficient use of resources, community support and develop volunteer knowledge skills and self-reliance.

August 31 is the application deadline to be considered for funding in the next budget year



# Types of Grants

## Corporate

Operating funding to assist with general operating expenses of a group, including administrative costs and program expenses

## In-Kind

Does not include the provision of cash funds; but rather services or items the Town can contribute towards - value is estimated

## Special Events

One-time or first-time event that is of cultural, social or recreational significance to the community

## Community Events

Recurring event that Council has determined provides significant benefit to the broad community and is open to all members of the public

## Sponsorships

Requesting funding for a special program that the Town supports in return for recognition and acknowledgment of receiving funding from the town



# *Funding Eligibility*

- Grants are awarded by project & only one application per organization/project
- Fundraising efforts must be shown; grant should not be considered primary source of funding
- Application must be for an Event / Project / Program
- Must provide access to arts, culture, environment, heritage, recreation, health
- Commitment to accessibility, effectiveness, accountability
- Must demonstrate the need for financial assistance
- Individuals are not eligible – must be a group, organization
- Applicant must spend the grant funding on the sole purpose for which it was awarded
- 2019 Council Motion – 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



# *Things to Keep in Mind*

## THERE IS ONLY ONE TAXPAYER

---



### **Committees of Council**

**The awarding of Grant Funding, as decided by Council, is the only means by which applicants can ask for funding. Applicants should not expect to seek further or additional funding from Committees of Council**



### **Membership Fees**

**Applicants requesting funding should consider any donation received by the Town to also cover any membership fees that may also be requested**



### **Upper Tier Funding**

**Applicants and Council need to be mindful that when funding has been requested/granted from both the Upper Tier and Lower Tier levels of government - the taxpayer is paying the combined amount through both taxation levies**



# *Review Process*

- The granting of assistance in one year does not mean a commitment to future years
- The grant shall be for one year unless Council has endorsed a multi-year commitment
- If the organization receiving funding fails to comply with the policy and the Town's standard of conduct, it will not be eligible in future years
- The Town reserves the right to participate in the planning of the anticipated event and/or review final plans and provide comments before the start of the scheduled event
- There is a "pool" of money in the budget to be divided up – the 2023 amount for Municipal Grant Funding was estimated to be **\$41,300**.
- The application requests before you tonight total **\$67,800**
- Based on the 2022 budget, 1% of the budget equals \$86,387



# *Next Steps & Recommended Motion*

- Tonight, council will hear the presentations and ask questions of the applicants
- THAT Council strikes a Municipal Grant Funding Review Committee;
- AND FURTHER appoints \_\_\_\_\_ & \_\_\_\_\_ to the committee;
- AND THAT the committee will bring forward funding recommendations for Council's consideration in January 2023.





## *Next Steps - Continued*

- Decisions on awarding of the funding is scheduled to take place at the January 23, 2023 meeting of council when the 2023 Draft Budget is presented by staff
- The 2023 Draft Budget will be presented with a pooled budget amount of \$41,300 for Municipal Grant Funding (unless staff are directed otherwise)
- Applicants will be informed by staff of the results once council has passed a motion indicating the 2023 amounts to be awarded and distributed
- The 2023 Draft Budget is not anticipated to be adopted until March 13, 2023



**2023 Grant Applications - December 12th, 2022 Council Presentation**

Prior New or In-Kind	Organization Name Alphabetical Order	Presenter Name	Description of Activity	2023 Requested Amount		Comments	Funding Requested from other levels of Government?	2022 Amount Received		Council Direction	
				Cash Value	Estimated In-Kind Value			Cash Value Grant Received in 2022	In-Kind Value Received in 2022	Cash Value Approved	In-Kind Value Approved
New	Back Pack Project - Shelburne Rotary	Michael Conte	Supply for 105 students backpack, lunchkit, reusable water bottle and if funding available grade appropriate school supplies	\$ 2,500.00	\$ -	Asked by the Shephard's Cupboard Food Bank to take over this project in 2020. Grown from 65 students in 2020 to 105 for 2022. Grades JK-12	No	\$ -	\$ -	\$ -	\$ -
Prior	Children's Foundation of Guelph & Wellington - Food & Friends Program (formerly Local Schools Breakfast Club)	Kit Stewart	Suport food costs for Food & Friends Student Nutrition Program at CDDHS, CHES, HHES, GBES, and St. Benedict Catholic School	\$ 5,000.00	\$ -	Brings healthy food to hungry minds by supporting breakfast, morning meal, snack and lunch programs; grant is not primary source of income. Serves 1,568 students/day	Ministry of Children Community and Social Services	\$ 3,000.00	\$ -	\$ -	\$ -
Prior	Dufferin County Canadian Black Association	Alethia Stephenson	Cultural awareness & Educational Programs that advocate equity and well being for the Black community; Assist with Strategic Plan to help build capacity to serve the growing community.	\$ 10,000.00	\$ -	Collaborates with many other Organizations; Serves all ages; Focus on youth mentoring; also collect Membership Fees in addition to grants and sponsorships; Donates funds to Streams & Shelburne Cricket Club	County of Dufferin	\$ 5,000.00	\$ -	\$ -	\$ -
Prior	Dufferin County Multicultural Foundation	Althea Ali	Room rentals, insurance, educational programs, advertising, equipment to run Multicultural Event	\$ 5,000.00	\$ -	Celebrate diversity and cultures within Dufferin County by showcasing arts, crafts, food, clothing and entertainment; Diversity & Inclusion Training	In Kind - MOD	\$ 3,000.00	\$ -	\$ -	\$ -
Prior	G.E.T. Outreachworks (Gathering Evolving Transforming)	Simone Thomas	Funds received will be used for marketing; event supplies, virtual events, book club, summer camps; improve availability of cultural material	\$ 3,000.00	\$ -	Cultural, Emersion, Education Program (CEEP); STEAM camp; Budget provided; sponsorships & donations outlined as other source of income	No	\$ 2,000.00	\$ -	\$ -	\$ -
InKind Only	Haunt in the Park - the Little Family	Jeremy & Carola Little	Host & hold annual Haunt in the Park at Fiddlepark. Asking for use for Sept 30 - Nov 14 2022	\$ -	\$ 10,656.00	Donations collected go Shepherds Cupboard Food Bank; Highschool students get volunteer hours - Waiving Park Rental Fees;	No	\$ -	\$ 5,000.00	\$ -	\$ -
Prior	Heritage Music Festival - Shelburne Rotary Club	Michael Conte	Advertising & promotion to increase diversity and attendance of the festival; expand to Bands & Brews	\$ 5,000.00	\$ 3,432.00	Grant is not the primary source of funding, In-Kind services requested as well, Donates to Streams, Food Bank, Multicultural Event, Back Pack Project, Breakfast program	County of Dufferin	\$ 5,000.00	\$ -	\$ -	\$ -
InKind Only	Pickin' in the Park - Greg & Heather Holmes	Greg & Heather Holmes	Host & hold annual Pickin' in the Park at Fiddlepark July 18 - 25, 2022; and organization meeting May 19-23, 2022	\$ -	\$ 4,700.00	Raise funds for the betterment of Fiddlepark; Donations to the Shepherds Cupboard Food Bank; Standard In-Kind services - includes waiving park rental fees	No	\$ -	\$ 4,700.00	\$ -	\$ -
Prior	Shelburne Christmas Hampers	Michael Conte	Purchase groceries or gift cards for the holiday season for recipients that must reside in the Shelburne area	\$ 2,500.00	\$ -	Assisted 165 families last year. No membership fees, strictly a grant request. Fundraising & Sponshorships are other sources of revenue	No	\$ 2,500.00	\$ -	\$ -	\$ -
Prior	Shelburne Community Welcome	Shaila (Bella) Carter	Welcome new residents to town with gifts from local businesses; funds needed to cover liability insurance, basket costs, gas.	\$ 2,500.00	\$ -	Promotes local businesses; keep residents informed, budget provided, grant is not the only source of revenue, 19 businesses partake	No	\$ 2,500.00	\$ -	\$ -	\$ -

**2023 Grant Applications - December 12th, 2022 Council Presentation**

Prior New or In-Kind	Organization Name Alphabetical Order	Presenter Name	Description of Activity	2023 Requested Amount		Comments	Funding Requested from other levels of Government?	2022 Amount Received		Council Direction	
				Cash Value	Estimated In-Kind Value			Cash Value Grant Received in 2022	In-Kind Value Received in 2022	Cash Value Approved	In-Kind Value Approved
Prior	Shepherd's Cupboard Food Bank Shelburne	Ardith Dunlop	All funds received will be used to purchase food and/or gift cards for those in need & experiencing food insecurities	\$ 20,000.00	\$ -	Financials & Budget provided, grant is not the primary source of income, serve 300 families/month; special request items with increasingly diverse population.	County of Dufferin	\$ 3,000.00	\$ -	\$ -	\$ -
Prior	Shelburne & District Agricultural Society	Sue Peterson	Annual Fair - activities, prizes, junior fair displays, Ambassador program, printing costs	\$ 1,500.00	\$ -	Financials provided, grant not the primary source of funding, Fair in its 155 year, longest running organization in town; open to all	County of Dufferin & Surrounding Local Tier Municipalities	\$ 1,000.00	\$ -	\$ -	\$ -
Prior	Shelburne & District Horticultural Society	Beverley Farmer	Maintain Entrance Gardens, Purchase seasonal plants, bulbs, material and mulch; quality guest speakers to educate	\$ 800.00	\$ -	Financials provided, grant is not the primary source of funding, have fund-raising activities & annual fee; draws & prizes purchased from local businesses	County of Dufferin	\$ 800.00	\$ -	\$ -	\$ -
Prior	Streams Community Hub	Andrew James	Operation Costs for programming based in Shelburne for youth aged 4-17 and their families	\$ 10,000.00	\$ -	Inspire youth and enrich community through the arts. Grant is not the only source of revenue, budget & financials included; Donate to DCCBA scholarship	County of Dufferin; Ontario Trillium Foundation	\$ 7,000.00	\$ -	\$ -	\$ -
				<b>\$ 67,800.00</b>	<b>\$ 18,788.00</b>			<b>\$ 34,800.00</b>	<b>\$ 9,700.00</b>	<b>\$ -</b>	<b>\$ -</b>

2023 Budget	\$ 41,300.00
Unallocated Funds	\$ 41,300.00

Additional Grants Awarded by Council in 2022 later in the year

7200 Dufferin Community Foundation - G Gallagher - \$1000.00 ( Pulled from reserves to fund)  
 Shelburne Farmers Market - BIA asked Town to take over market - funds \$2000.00, plus draw funds from BIA tax revenue  
 Dufferin County Multicultural Foundation - Membership Fee over and above Grant Awarded

Prior Year Grant Recipients that did not apply again for 2023

None

	\$ 1,000.00
	\$ 2,000.00
	\$ 250.00
	\$ -
<b>Total Spent in 2022</b>	<b>(excluding InKind) \$ 38,050.00</b>
<b>2022 Budget</b>	<b>\$ 37,300.00</b>
<b>Tsf from Reserves</b>	<b>\$ 1,000.00</b>
	<b>\$ 38,300.00</b>

## **CORPORATION OF THE TOWN OF SHELBURNE**

### **MUNICIPAL FUNDING POLICY**

#### **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 recognize the financial constraints impacting the Town's ability to provide funding to these groups.

#### **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.

#### **Program Intent**

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 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 grants.

Council will, through its annual operating budget, determine the amount of funds to be allocated to the grant program. Council will retain the right to make the final decision on both the overall grant allocation and the individual grant.

#### **Types of Grants**

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 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.

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.

## Schedule A to By-law 05-2016

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.

### **Funding Eligibility**

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

- 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.
- 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.
- 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.
- Individuals are not eligible
- The applicant organization, within the current fiscal year, must spend grant funding on the sole purpose for which it was awarded.

### **Application**

All grant applications shall be directed to the Treasurer or Deputy Treasurer on or before August 31st of each year to ensure they are incorporated in the annual budget.

Only one grant request per organization per year will be considered.

All applications shall be submitted on the Grant Application form together with the following information and documentation:

1. Outline the level of service the organization provides to the community;
2. The amount of financial assistance required;
3. The degree in which the community benefits as a result of the grant;



## Schedule A to By-law 05-2016

4. A proposed budget for the current year, detailing expenditures and revenues, including a list of all other grants and/or donations;
5. Sponsorship funding requesters are required to submit a letter to the Town including 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.

### **Application Review Process**

Late or incomplete applications for any grants will not be forwarded for consideration.

Completed applications for Corporate grants, and Community Event grants (as defined by this policy) which are received by the August 31<sup>st</sup> application deadline will be forwarded to the Council as a Whole and/or Budget Steering Committee during budget deliberation meetings for review and consideration.

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

Granting of assistance in any one year or over several years is not to be interpreted as a commitment to future year's funding.

Recognizing that unique and beneficial "Special Events/Sponsorship" requests may also arise from time to time outside of the time lines 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.

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, of Council's decision.

### **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 1<sup>st</sup>.

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

Schedule A to By-law 05-2016

**Payment**

The term of a 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.

Grant recipients will be notified in writing of the grant amount approved 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, particular restrictions apply to the grant.

Schedule A to By-law 05-2016