



# CITY OF WEST KELOWNA

## COUNCIL POLICY MANUAL

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Approval Date: 2016-SEP-20

<b>DEPARTMENT:</b>	<b>Finance</b>
<b>SUBJECT:</b>	<b>GRANTS IN AID</b>

### Purpose Statement:

The City of West Kelowna recognizes that valued contributions being provided through the volunteer efforts of community organizations and agencies on behalf of the citizens. Corporate 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 City'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.

### **Program Intent**

Every year the municipality 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 Grants Program is to share available resources throughout the municipality. Grants 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: Community Project grants, Corporate grants, In-Kind Contribution grants, Special Events grants and Community Events grants.

Council will through its annual budget process, determine the amount of funding 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 Grant Program are as identified:

“Community Project” grants are defined as one-time assistance either as seed funding for the start up of an organization/project, or funds for a short-term undertaking with a start-up and completion date.

“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, material 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 may involve the participation of more than one organization.

“Community Events” 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.

## **Funding Eligibility**

An applicant organization must meet the following general criteria in order to be considered for a City of West Kelowna grant:

1. Grants are awarded by the type of project, not the type of organization/agency.
2. There can only be one application per organization/project.
3. Grant applications should be able to demonstrate active fundraising efforts to support the continuation of a program, project or service. The City of West Kelowna grant should not be considered as the primary source of funding for the organization.
4. Funding request can be defined as events/projects/programs that support sustain, promote, inform, educate, celebrate, preserve, and/or provide access to the arts, culture, and environment, heritage, recreation and/or health activities.
5. Request for financial assistance for events which are of municipal significance which would be expected to bring economic and/or public relations benefit to the City.
6. Each application must demonstrate there is a need for financial assistance and that adequate funding for other sources is not available.
7. To qualify for funding, the group must demonstrate its commitment to all of the following principles:
  - a. Accessibility;
  - b. Effectiveness; and
  - c. Accountability through sound management and financial practices
8. The applicant organization, within the current fiscal year, must spend grant funding on the sole purpose for which it was awarded.
9. Individuals are not eligible.

**Programs/Activities/Events MUST NOT:**

1. offer direct financial assistance to individuals or families;
2. duplicate services that fall within the mandate of either a senior government agency or a local agency, except where there is an established need.
3. be for any other form or section of a taxing or local government authority, such as School Districts, Regional Districts, Hospital Districts, etc.

**Application:**

All grant applications shall be directed to the Revenue Manager on or before October 31<sup>st</sup> 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. the service the organization provides to the community;
2. the amount of the financial assistance required;
3. the benefits in the community to result from the grant;
4. a detailed proposed budget for the current year, detailing expenditures, and revenues, including a list of all other grants and or donations;
5. the financial statements from the immediately preceding fiscal year.

**Application Review Process**

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

Complete applications for “Community Project” grants, “Corporate” grants, and “Community Event” grants (as defined by this policy) which are received by the October 31<sup>st</sup> application deadline will be forwarded to the Council during budget deliberation meetings for review and consideration.

In considering grant applications, Council will evaluate applications in terms of the general and financial criteria and principles outlined in the Municipal Grants Program Policy and interview any group during the yearly budget deliberations with final recommendations based on the total grant allocation and approval on 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 may arise from time to time outside the time lines noted in the City of West Kelowna’s Grants in Aid Policy, applications for “Special Events” grants received after the grant deadline will be dealt with under Council’s “Requests for Financial Support” policy.

Grant applications determined to be ineligible for funding shall be notified, in writing, of Council’s decision.

Applicants are advised that the In-Kind non-financial grants may not be continued from year to year as renewals are not automatic.

The grant application deadline shall be advertised in the local newspapers.

### **Payment**

The term of a grant shall be for one year only.

Applicants are advised that grants may not be continued from year to year.

Renewals are not automatic nor are any increases in funds.

Grant recipients will be notified in writing of the grant amount approved following Council approval of the municipality'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.

Unsuccessful grant applicants will also be advised in writing of Council's decision.

Included in Council's budget deliberations are requests from various City of West Kelowna organizations that request financial assistance. These groups vary in interests and provide a valuable service to the City of West Kelowna. With Council's approval Grants in Aid are given to these groups on an annual basis. A policy exists for these Grants in Aid requests.

In addition to the annual requests considered by Council as part of the annual budget process other requests are made by various other groups throughout the year. These requests vary depending on the group requesting assistance and the amount also varies. Many of these requests are also of benefit to the community.

Previous Revision/s: Grants-In-Aid Policy Adopted 2008-FEB-19 Grants-In-Aid Policy Adopted 2009-MAY-26 Grants-In-Aid Policy Adopted 2011-MAY-10
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