



CORPORATION OF THE TOWNSHIP OF ESQUIMALT

COUNCIL POLICY

TITLE: Local Grants Policy

NO. ADMIN - 32

PURPOSE:

This grant program is designed to financially assist community groups and not-for-profit societies and organizations in achieving their objectives. Local grant funding is intended to provide support to societies, organizations and committees with the expectation is that alternate sources of funding will be secured.

PROCEDURES:

APPLICATION

- Application forms can be obtained from the Township's Financial Services Department or the Township website. Completed forms, together with all supporting documents may be delivered, mailed, emailed or faxed to the attention of the Director of Financial Services.
- All applications must be received prior to December 31 each year.
- Each application should include the following details regarding their project, program or event:
 - the nature, goals and objectives;
 - the names of those who will be involved and, if applicable, a list of the Board of Directors;
 - a projected statement of revenue and expenses;
 - any additional support provided by the Township, such as a permissive tax exemption, community events funding or in kind contributions
 - a statement indicating the anticipated impact on the Township of Esquimalt; and
 - the prior year's financial statements for the organization.
- Organizations holding events are encouraged to provide details regarding Green initiatives which will form part of their event planning and execution. For additional information and guidance, please refer to the Township's Green Event Planning Guide located at www.esquimalt.ca/greenevents.
- No retroactive funding applications will be considered.
- Organizations that receive a partial grant or are denied funding will be unable to make a second request within the same calendar year.

EFFECTIVE DATE:
October 3, 2016

APPROVED BY:
Council

REF:
Staff Report
FIN-16-014

AMENDS NO.
February 22, 2016

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ESTABLISHED EVENTS***Criteria***

The designation as an Established Event will be made by Council if:

- The organization is holding a community event (programs and projects do not qualify)
- The event has been held within the Township during the last two consecutive calendar years; and
- The organization has submitted all annual reporting requirements under this Policy.

Once designated, there would no longer be a requirement for event organizers to appear before the Local Grant Committee to speak to their application. Instead, organizers would only be required to submit all event details, budget and financial information and the amount of financial and in kind support requested. Although established events can make annual requests, Council has the final decision regarding the actual level of financial and in kind support granted to each established event.

In Kind Support

- In kind support will only be provided for established events, unless otherwise approved by Council
- Each event committee may be provided, at the discretion of Council, a maximum value of \$10,000 which may include utilization of Township staff, facilities or equipment without being directly charged for the related costs
- Council will support the Event Committee as they:
 - Plan and implement all activities associated with their Event;
 - Work with municipal staff to coordinate services, facilities, and resources as required and available; and
 - Identify Green initiatives related to their Event with the assistance of the Township's Green Event Planning Guide.

Appointments

For any community event receiving in kind support, Council may:

- elect a Councillor to act in an advisory and liaison capacity with the Committee and attend committee meetings; and
- request that a staff representative attend committee meetings

The Event Committee shall annually submit to the Municipal Council for ratification, a list of Committee liaisons. The Event Committee may invite representation from other community groups/organizations.

Insurance

Each Event Committee will be responsible for coordinating and obtaining insurance coverage for their event. The Committee shall ensure that their event carries insurance with a minimum of \$2,000,000 liability coverage and the Township will be identified as an additional insured within the policy. Evidence of this insurance coverage shall be provided to the Director of Financial Services prior to commencement of the event.

FUNDING

Each year Council may provide an amount of funding through the Local Grants Account within the Financial Plan. The initial balance in the account each year will be equal to a figure which represents a .50% tax increase based on the previous year's actual financial results.

A Local Grant Committee will recommend the allocation of grants to programs, projects and events. This recommendation is not to exceed 90% of the Local Grant Account balance. Subsequent to Council's approval of the local grant allocations, any balance remaining in the account may be allocated throughout the remainder of the year at the discretion of Council.

To access the remaining funds after the initial 90% has been allocated, applicants must submit an application to the Director of Financial Services. The applicant will then be required to appear before Council for a direct decision regarding their funding request.

GRANT REVIEW PROCESS

- The Local Grants Committee members will be appointed by the Mayor and will consist of three members of Council, rotated annually throughout the term, and will be supported by a non-voting representative from the Financial Services Department.
- Applications will be received and reviewed by the Director of Financial Services to ensure each application is complete prior to forwarding the completed applications to the Local Grants Committee.
- No grant request will be forwarded for consideration if an application is incomplete or if a previous grant was provided and the conditions of funding specified in this policy or by resolution of Council were not fully satisfied.
- The Committee will meet to review all applications prior to February 28 each year.
 - For an application to be considered, applicants (other than established events) must appear before the Committee to speak to their application for a maximum of three (3) minutes at a date and time arranged by the Township.
 - Preference will be given to applications from organizations based in Esquimalt or those that provide a service to Esquimalt residents.
 - It should be the goal of each organization to reduce the amount of financial support requested from the Township in each subsequent fiscal year.
- Following all presentations, the Committee will draft their recommendations to Council for the allocation of support and the total amount to be included in the Financial Plan.
- Council will make the final decision on the allocation of support and once approved:
 - The Financial Plan will be updated to reflect the total amount of cash and in kind support to be provided from the Local Grant account;
 - All local grant financial payments will be made prior to March 31 each year; and
 - Any in kind support commitments will be communicated to the appropriate Township departments.

- Communication will be sent to all applicants advising them of Council's decision and a list of recipients and corresponding amounts will be posted annually on the Township website.
- To request support after the grant process has been completed new applicants must submit a formal application and appear before Council for a decision on funding.

CONDITIONS OF SUPPORT

- Funds must be used for the purpose for which they were requested. Any funds not used for the requested purposes must be returned to the Township.
- All recipients must acknowledge the Township's support (financial and/or in kind) through social media and in all printed publicity material related to the project including banners and signs on site during the event.
- Each recipient of financial or in kind support must submit a final report to the Director of Financial Services within 120 days of project or event completion. This report should include the following details for their project, program or event:
 - a brief evaluation (based on the pre-established goals and objectives);
 - a financial statement of actual revenue and expenses (where applicable);
 - details regarding the Green performance (where applicable);
 - attendance figures (where applicable);
 - number of participants; and
 - an evaluation of the impact on the community
- In the event that the project is not completed, the grant recipient organization must notify the Township within the same calendar year during which funding was received. The Township of Esquimalt reserves the right to request the return of the grant.

CORPORATION OF THE TOWNSHIP OF ESQUIMALT

LOCAL GRANT APPLICATION

For Year: _____

Name of Organization: _____

Address of Organization: _____

Phone: _____ Fax: _____ email: _____

Contact Person: _____

Position(s) with Organization: _____ Phone: _____

Amount Requested: \$ _____ Total Project Budget: \$ _____

Have you applied before? _____ When? _____ Grant Received: \$ _____

If yes, have you submitted a final report for previous year funding? Yes [☐] No [☐]
(note: report must be submitted to receive consideration for further funding)

Fiscal year of organization: From _____ To _____

Are you currently receiving benefit from a Property Tax Exemption from the Township of Esquimalt? Yes [☐] No [☐]

Incorporation number and date of incorporation: _____

Registered Canadian Charitable Organization number: _____
(Applicants must be not-for-profit organizations or be otherwise publicly accountable)

Is your organization based in Esquimalt Yes [☐] No [☐]

Is the project for which you are requesting funding based in Esquimalt? Yes [☐] No [☐]

If yes, please provide the location/address: _____

Describe your organization, its mandate and program(s): _____

Describe the project for which funds are being sought. What other sources of funding are being pursued? Please indicate why you think it should receive municipal funding. Feel free to use additional sheets of paper.

Project Description (including date and location):_____

Purpose of this project:_____

The names of those involved in carrying out the project:_____

Green Event Initiatives:_____

Benefit to Esquimalt:_____

PROJECT BUDGET

Please give details on revenue and expenditure projections. Indicate which revenue is secure and which is speculative. (note: Expenditures must NOT exceed Revenues)

REVENUE (Please state source)		EXPENDITURE (Please itemize)	
Description	Amount	Description	Amount
SECURE			
Subtotal			
SPECULATIVE			
Subtotal			
TOTAL		TOTAL	

Authorized Signature: _____ Date: _____

Please enclose your last annual report and financial statements, if applicable. Include any supporting material that would assist in the assessment of your project.

Please mail or fax this application to:

Director of Financial Services
Corporation of the Township of Esquimalt
1229 Esquimalt Road
Esquimalt, BC
V9A 3P1

Phone: 414-7141
Fax: 414-7111