

## **Municipality of the District of Shelburne GRANTS POLICY**

### **1. APPLICATION**

This program governs grants to community non-profit organizations and charities.

The *Municipality of the District of Shelburne Grants Program* has five main categories:

- **Support Grants – Community-Based Organizations**
- **Community Recreation and Parks Grants**
- **Community Heritage Grants**
- **Community Festival and Event Grants**
- **Community Capital Grants Program**

This program does not govern the following, which are separately administered:

- ❖ Grants and contributions pursuant to inter-municipal or other agreements;
- ❖ District Grant Fund
- ❖ Kids' Fair Play FUND
- ❖ Municipality of the District of Shelburne Fire and Emergency Services operating & capital grants;
- ❖ Harbour Authorities & Societies Capital Assistance Program;
- ❖ Tax Exemption for Non-Profit Organizations (full and partial tax exemption bylaws);
- ❖ Residential Property Tax Rebates (low-income homeowners); and
- ❖ Municipality/Region wide Economic Development

### **2. AUTHORITY**

Section 65, *Municipal Government Act*, as amended.

“65 The council may expend money required by the municipality for ...

(l) advertising the opportunities of the municipality for business, industrial and tourism purposes and encouraging tourist traffic, with power to make a grant to a nonprofit society for this purpose;

(au) a grant or contribution to

- (i) a society within the meaning of the *Children and Family Services Act*,
- (ii) a mental health clinic in receipt of financial assistance from the Province,
- (iii) an exhibition held by an educational institution in the municipality,
- (iv) a club, association or exhibition within the meaning of the *Agriculture and Marketing Act*,
- (v) any charitable, nursing, medical, athletic, educational, environmental, cultural or social organization within the Province,
- (va) a day care licensed under the Day Care Act,
- (vi) a registered Canadian charitable organization,

**and the municipality shall publish annually a list of the organizations and grants or contributions made pursuant to this clause on their website and in a newspaper circulating in the municipality; ...”**

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### **3. BASIC POLICY**

**Funding for these grants is contingent on the approval of the Operating Budget by the Municipality of the District of Shelburne Council.**

All grant applications under the *Municipality of the District of Shelburne Grants Program* shall be assessed using the evaluation criteria contained in *Schedule A*. All grant applications shall normally be submitted on the form provided by the municipality. The Municipality of District of Shelburne will not consider requests received as part of general (mass) mailing or telemarketing campaigns.

Preference will be given to organizations that demonstrate community support, efficient use of resources, sound business practices and develop volunteer knowledge, skills and self-reliance. Funding will not normally be provided to social service, health or similar agencies.

Usually organizations receiving funding assistance should be Incorporated as non-profit under the Joint Stock Companies Societies Act, however, groups that are not Incorporated but have an executive, membership, and a positive history are eligible to make application for funding assistance.

In some cases one facility is both a fire department and a community hall. The parts of the hall identified as fire department – examples: fire fighting equipment, training, insurance, and fire truck bays, etc – are provided for in a grant to Fire Departments, therefore they are not eligible for funding from the Grants to Organizations Program. The parts of the same hall identified as community hall – examples: kitchen, bathrooms, dance floor, etc - are used for social recreation purposes and are therefore eligible for funding from the Grants to Organizations Program.

The **deadline for grant applications** is January 31<sup>st</sup> or the last working day of the month of January. Late applications shall only be reviewed after applications received by the deadline have been processed.

### **4. 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 *Municipality of the District of Shelburne Grants Program* is to share available resources throughout the Municipality. Supporting volunteer, community-based organizations is often fundamental to maintaining our quality of life.

Grants are intended to provide modest levels of support and assistance to community non-profit organizations. The program tries to balance on-going needs and a rotation of new applicants.

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**5. PROGRAM COMPONENTS**

**A. Support Grants – Community-Based Organizations**

Municipality/Region Wide  
Community/Local

**B. Community Recreation and Parks Grants**

Community-Based Recreation Programming  
Property Development and Community Facilities (e.g., buildings, sites, trails)  
Leadership Development  
Community-Based Arts (e.g., visual, performing and literary arts)

**C. Community Heritage Grants**

Heritage Conservation  
Heritage Public Education  
Heritage Assistance for Lighthouses and Museums

**D. Community Festival and Event Grants**

Festivals and Events hosted by local community organizations

**E. Community Capital Grant Program**

To assist communities in the development of indoor and outdoor cultural, social, heritage and/or recreation facilities

To conserve existing community facilities

To assist in the development of new community facilities.

**6. TYPES OF GRANTS**

The different types of grants awarded under the *Municipality of the District of Shelburne Grants Program* are listed below. Although there are several different types of grants, **most awards are one-time developmental, one-time operating and a limited number of multi-year grants.**

**One-time developmental grant:**

- Normally awarded for a start-up project, a single purchase, or a building/site expense.
- Grant awards are normally in the \$500 to \$1,000 range

**One-time operating grant:**

- Normally awarded to support an *on-going community-based program* recognized as a priority within a community.
- This type of grant is not intended to support permanent full-time staff, salaries or wages.
- Although an organization may be awarded this type of grant several times, the award does not carry the guarantee of renewal over several years.
- Grant awards are normally in the \$500 to \$1,000 range.

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### **Multi-year grant:**

- Multiple year funding options do not mean the Municipality will pre approve and fund projects for up to 4 years. Funding approvals are for one year only, however, it is recognized that a project may take more than one year to complete. The group is encouraged to submit applications as updates in subsequent years to continue to work on the same project. The group's most recent financial statements and updated project budget would be required each year.
- Renewable up to four (4) years, with no pre-set maximum.
- Normally awarded to support an on-going program or service that is *a priority or determined to be important within the municipality's mandate* of programs and services.
- This type of grant may be awarded for building projects where the cost is spread over more than one year or to assist organizations that provide services countywide.
- This type of grant may also be awarded for a large-scale, multi-year program or special project, subject to a signed agreement between the Municipality and the recipient organization.
- The *Municipality of the District of Shelburne Grants Program* is limited in its ability to respond to large requests with short notice. It is essential for an organization planning an expensive multi-year project to give the municipality as much notice as possible (usually at least one year) so that it can be considered within the municipality's fiscal framework well in advance.

### **Multi-year developmental grant:**

- Renewable up to three (3) years.
- Normally awarded on a diminishing scale with the amount decreasing each year.
- Awards are intended to help a program get started and move towards self-reliance.
- Grant awards are normally \$1,000 or less, but may be up to \$1,500 in the first year.

### **Multi-year transitional grant:**

- Renewable for up to three (3) years with no pre-set maximum.
- This type of grant is limited to circumstances where the municipality has given notice it will discontinue grant funding to a program or service, which creates financial hardship.
- A signed agreement between the Municipality and the recipient organization is required.

### **Multi-year stabilization grant:**

- Renewable for up to four (4) years with no pre-set maximum.
- This type of grant is limited to cases of insolvency, operational restructuring or to transition an organization to lower levels of municipal funding.
- A signed agreement between the Municipality and the recipient organization is required.

### **In Kind grant:**

- Request to borrow Municipal equipment has a monetary value
- Request for Municipal staff time has a monetary value

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- Request for Municipal services has a monetary value

### **Service Agreement Contract:**

- This type of award may only be initiated by the Municipality through a request for proposals (RFP) competition. Unsolicited proposals will not be considered.
- This type of contract may be used when a clear service gap has been identified *within the municipality's mandate* and alternate service delivery is an appropriate strategy.
- This type of contract may also be used for transitional programs that replace or supplement a municipal service with a community-managed program.
- A signed contract between the Municipality and the service provider is required.
- Although possible, the municipality will seldom use service agreement contracts.

## **7. GRANTS REVIEW PROCESS**

7.1 Application form received, date-stamped and acknowledgement sent to applicant. Additional information is requested if the application is incomplete.

7.2 Applications are sorted by category, sent to appropriate staff member or team members to evaluate (score and comments) and then submitted to the Municipal Grants Committee.

**(For applications received under the Heritage Assistance for Lighthouses and Museums Program, the preliminary list of recommended grants and supporting information will be submitted for review by the Heritage Advisory Committee.)**

**(For applications received under the Community Recreation & Parks Grants, the preliminary list of recommended grants and supporting information will be submitted for review by the Municipal Recreation & Parks Advisory Committee)**

7.3 The Municipal Grants Committee develops a preliminary list of recommended grants based on each application's score, relative merit of applications in the category, and the budget.

7.4 The CAO submits the preliminary list of recommended grants and supporting information to the Audit, Program, and Service Committee for review. The committee's primary task is to make sure the process is fair and the awards recommended are within budget.

7.5 The CAO submits the final list of recommended grants to Committee of the Whole. Once amended and approved by Committee of the Whole, the list, as amended, is forwarded to Municipal Council for final approval. Letters are sent to grant recipients, noting program reporting requirements and any restrictions. Letters are also sent to unsuccessful applicants. **There is no appeal process.** The list of awards is public information and is published annually.

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**8. GENERAL CONDITIONS**

- Applications received after the January 31<sup>st</sup> or the last working day of the month of January **application deadline** are considered "late". Late applications are reviewed only after the regular review. Each year the municipality receives more applications than it can fund, so it is important for applications to be on time and contain the correct information.

Awards will be announced within **four weeks of budget approval**.

- All applicants must comply with Section 65 of the Municipal Government Act.
- Only **one application** per organization can be submitted in each funding year.
- Applicants must have the deed/lease to the property/facility or acceptable alternative. (For Capital Grants only)
- Churches are not eligible for funding unless registered as a Municipal Heritage Facility. Recreation programs offered by church groups are eligible for assistance.
- An organization can apply to different categories of funding year-to-year. Each year, the applicant must select the grant category that best fits a particular project.
- Applicants may be requested to make a verbal presentation to Committee of the Whole to explain further and outline the specifics of their projects.
- Grants are awarded by the type of project, not the type of organization.
- The municipality requires promotion of equality of access and opportunity for all persons.
- Grants are not awarded for the salary/wages of staff positions or board honoraria.
- Grant applicants should be able to demonstrate active fundraising efforts and/or additional funding sources to support the continuation of a program, project or service.
- Grants may be awarded with certain terms and conditions. The letter of award will state if any particular restrictions apply to the grant. Payout restrictions may be put on a new group that is not incorporated. Examples: Groups must submit receipts up to the amount approved and then be reimbursed or they must submit bill(s) totally up to the amount approved for payment. Funding, including multi-year grant awards, may be revoked for failure to comply with terms and conditions.
- Awards may be issued in full (the usual practice) or can be paid in installments. The letter of award will state if a holdback applies to the grant.
- In rare circumstances, an applicant's eligibility may be suspended for a specified time period for misappropriation of funds, failure to report, or misrepresentation.
- At the end of a project or by the end of the Municipality's fiscal year, whichever comes first, grant recipients must submit a report and/or financial statement to the municipality.
- Each application determined to be ineligible for funding will be documented and

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included in the staff report to Committee of the Whole. The applicant will be notified, in writing, if the application is not eligible.

**9. GRANT POLICY REVIEW**

This Policy is to be reviewed by the CAO within 4 years of the previous approval date.

**Schedule A**

<b>Evaluation Criteria – Grant Applications</b>	<b>Score</b>
<b>1. <u>Program/Service Obligation</u></b> <b>Core</b> – service the municipality <u>would</u> otherwise provide <b>Important</b> – service the municipality <u>might</u> otherwise provide <b>Discretionary</b> – service the municipality does not normally provide <b>No Mandate</b> – not enabled by legislation, should not do or not now	<b>H 3</b> <b>M 2</b> <b>L 1</b> <b>N 0</b>
<b>2. <u>Municipal Mission</u></b> <b>Vital</b> – fundamental to Municipality’s mission or key result areas <b>Notable</b> – solid fit within Municipality’s key result areas <b>Non-Critical</b> – some relevance to Municipality’s mission, not strategic	<b>H 3</b> <b>M 2</b> <b>L 1</b>
<b>3. <u>Public Need</u></b> <b>Community at Large</b> – general need, broad-based <b>Multiple Interests</b> – some need, a number of areas/communities <b>Vested Interest</b> –special interest group(s), localized	<b>H 3</b> <b>M 2</b> <b>L 1</b>
<b>4. <u>Public Benefit</u></b> <b>Public Interest</b> – all residents/communities may derive benefit <b>Mixed Interest</b> – some residents/communities derive benefit <b>Private Interest</b> – specific residents/communities benefit	<b>H 3</b> <b>M 2</b> <b>L 1</b>
<b>5. <u>Human Development &amp; Inclusion – Volunteer &amp; Participant</u></b> <b>High</b> – equality of access and opportunity (demographic, geographic) <b>Moderate</b> – range of demographic groups and/or development potential <b>Low</b> – limited opportunity, access or development potential	<b>H 3</b> <b>M 2</b> <b>L 1</b>
<b>6. <u>Quality of Life</u></b> <b>Livable Community</b> – important to livable/sustainable community <b>Community Image</b> – enhances image or public perception <b>Community Pride</b> – instills pride, sense of community	<b>H 3</b> <b>M 2</b> <b>L 1</b>
<b>7. <u>Alternate Providers</u></b> <b>Limited</b> – no other potential providers <b>Some</b> – some potential alternate providers <b>Many</b> – many potential or existing alternate providers	<b>H 3</b> <b>M 2</b> <b>L 1</b>
<b>8. <u>Financial Need</u></b> <b>High</b> – financial statements and/or budget demonstrate significant need <b>Low</b> – financial statements and/or budget demonstrate limited need	<b>H 1</b> <b>L 0</b>
<b>9. <u>Accountability (“Track Record”)</u></b> <b>Yes</b> – annual report and/or financial statements of previous year received <b>No (or New Org.)</b> – no annual report and/or financial statements received	<b>Y 1</b> <b>N 0</b>

**Municipality of the District of Shelburne  
136 Hammond Street/PO Box 280  
Shelburne, NS, B0T 1W0**

**Application – Municipality of the District of Shelburne  
Grants Program**

<b>Name of Applicant Organization:</b>	
<b>Contact Person:</b>	<b>Telephone:</b>
<b>Mailing Address:</b>	<b>Civic Address:</b>
<b>NS Registry of Joint Stock Number:</b>	<b>Federal Charitable Status Number:</b>

**Please ensure your application includes the following information:**

- ✓ Proof of current registration as a non-profit or charitable organization (copy of current Joint Stock Companies renewal of registration under the NS *Societies Act* from the Registrar of Joint Stock Companies or Charitable Registration Number from Canada Revenue Agency). If your organization is in the process of applying for registration, please include a copy of your application form.
- ✓ The grant category (Section 1) and type and amount of grant requested (Section 2).
- ✓ A list of grants to your organization from federal, provincial or other local government agencies or departments (Section 3).
- ✓ If this is a new project, a list grants that your organization intends to apply or has made application to other levels of government for the same project (Section 3).
- ✓ A covering letter if you want to provide additional information about your organization and its goals/objectives. Two letters of support or testimonials are recommended. (Section 4). **Please do not include bound materials, promotional materials or reports. If we require more information, you will be contacted during the review process.**
- ✓ The location of your project/activities (Section 5) and benefits to the Municipality (Section 6).
- ✓ A list of other grants or support your organization already receives from the Municipality of the District of Shelburne (e.g., property tax exemption for non-profit organization) (Section 8).
- ✓ The most recent financial statement (or Treasurer's report) and a budget for the coming year (if the organization is just starting up, the budget for the coming year) (Section 9).
- ✓ An accurate (up to date) list of members of the Board of Directors with name, address and telephone number (Section 10).

The policy governing the *Municipality of the District of Shelburne Grants Program* is available on our web site [www.municipalityofshelburne.ca](http://www.municipalityofshelburne.ca) or may be obtained by calling (902) 875-3544.

**1. Please check (√) a grant category and sub-category that applies to your application:**

Category (Check One)	Sub-Category (Check One)
<input type="checkbox"/> Support Grants - Community-Based Organizations	<input type="checkbox"/> Municipality or Region Wide Program/Service <input type="checkbox"/> Community or Local Area Program/Service
<input type="checkbox"/> Community Recreation and Parks Grants	<input type="checkbox"/> Community-Based Recreation Programming <input type="checkbox"/> Property Development/Community Facilities <input type="checkbox"/> Leadership Development <input type="checkbox"/> Community-Based Arts
<input type="checkbox"/> Community Heritage Grants	<input type="checkbox"/> Heritage Conservation <input type="checkbox"/> Heritage Public Education <input type="checkbox"/> Heritage Assistance for Lighthouses & Museums
<input type="checkbox"/> Community <i>Festival and Event Grants</i>	<input type="checkbox"/> Festivals and Events hosted by local community organizations
<input type="checkbox"/> Community Capital Grants Program	<input type="checkbox"/> New Community Facilities (Indoor & Outdoor) <input type="checkbox"/> Conservation of Existing Community Facilities

**2. Please check (√) the type of grant you are applying for and indicate the amount:**

Type of Grant (Check One)	Amount of Grant Requested			
One-Time Development Grant	\$			
One-Time Operating Grant	\$			
Multi-Year Grant (max. 4 yrs)	Year 1	Year 2	Year 3	Year 4
	\$	\$	\$	\$
Multi-Year Development Grant (max. 3 yrs)	Year 1	Year 2	Year 3	
	\$	\$	\$	

In Kind Grants

Equipment :

Staff Time:

Services:

**3. Have you applied for other funding for this project/program/service? Please list:**

Funding Body	Requested	Confirmed
Federal Government (List Depts./Agencies)	\$	\$
Provincial Government (List Depts./Agencies)	\$ \$ \$ \$	\$ \$ \$ \$
Other Municipalities/Local Government Bodies	\$ \$ \$ \$	\$ \$ \$ \$
Other Funding Bodies	\$ \$ \$ \$	\$ \$ \$ \$

**4. Please describe your organization's specific project, program or service:**

**5. Please describe the community, area and/or group(s) your organization serves:**

**6. What benefits will your project, program or service provide to the community/municipality?**

**7. What role(s) do/will volunteers play in this project/program/service or the operations of your organization? How many volunteers participate?**

**8. Does your organization receive other forms of assistance from the municipality?**

**9. List the in kind contributions that your organization will provide to this project/program/service.**



**12. Authorization**

<b>This application must be signed by an authorized signing officer of the Board of Directors:</b>			
Application Prepared By: (Contact)	_____	_____	_____
	Signature	Print Name	Date
Board Authorization:	_____	_____	_____
	Signature	Print Name	Date

**Remember the Deadline for Applications is January 31<sup>st</sup> or the last working day of the month of January to be considered for funding in the upcoming fiscal year. As you review the policy, you will note that provision has been made for applicants to submit an application for a multi-year grant. You may wish to submit an application on that basis to eliminate the necessity of submitting a separate request in each subsequent year. All that would be required is submission of your most recent financial statements and updated budget each year.**

**Please mail, drop off, or email your application form and any supporting materials to:**

Municipality of the District of Shelburne  
136 Hammond Street,  
PO Box 280  
Shelburne, NS  
BOT 1W0

[Infoofficer@municipalityofshelburne.ca](mailto:Infoofficer@municipalityofshelburne.ca)

Upon receipt all applications are date-stamped. Late applications are date-stamped and reviewed after on-time applications. Due to the number of grant applications normally received each year late applications are usually declined.

If you are applying for a Community Recreation and Parks Grant and need assistance in completing the application, please contact Municipality of the District of Shelburne Recreation and Parks Dept. at (902) 875-3544 ext. 225.

**If you are concerned about your application being received on time through the mail, you may fax a copy of this form only to (902) 875-1278.** All applications that are faxed must be supported by the original document through the mail or by hand delivery.

Although the Municipality of the District of Shelburne is unable to fund all applications received, we appreciate the interest of community groups in our program and recognize the valuable contribution made by volunteers to the quality of life in Municipality of the District of Shelburne.