

		<b>Community Donation and Operational Grant Policy</b>		<b>Policy #5.1.01</b>	
Department Owner:		Finance			
Policy Applies To:		Non-Profit Community Organizations			
Date Created:		Dec 2015	Date Approved By Council:		January 24, 2022
Version #:		2.0	Resolution #:		22-010
Last Review Date:		January 14, 2022	Policy(ies) Replaced/Rescinded:		V1.0

### Intent

To establish the funding criteria and application procedure for requests for financial or in-kind assistance from individuals, or community groups and organizations, in the Town of Claresholm.

To provide Council with a consistent response and clear direction to requests for donations and operational grants from individuals or community groups.

To secure an open and transparent decision-making process for requests.

To provide clear procedures for staff when responding to requests.

To match the Town of Claresholm Strategic Goals and Priorities.

### Policy

The Town of Claresholm recognizes the many benefits that various groups, organizations, volunteers, and events provide to the Municipality; specifically, by promoting and improving upon the cultural, social, and economic well-being of the community. The Town of Claresholm is thus committed to treating all requests for contributions and grants in a consistent, fair, and equitable manner subject to local needs, priorities, and to Council's approved budget. Council also recognizes that citizens have the right to expect that tax dollars will be expended in a manner that is justifiable, fair and holds groups accessing public funds accountable for their spending.

### Definitions

**"Community Donation"** shall be any direct monetary contribution from the Town of Claresholm to the applicant.

**"Community Project Funding"** shall be a 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 or loan guarantees to assist an organization in acquiring the financial assistance, from financial institutions, needed to support the construction of the project or support for a specific project.

**"In-Kind Contributions"** shall be 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 contributions, it is recognized that the contribution will involve either an expense or foregone revenue for the Town of Claresholm.

- Use of facility (rental fee reduced/waived)
- Staff support - expertise for an event (wages reduced/waived)
- Use of Town of Claresholm owned equipment (rental fee reduced/waived)
- Use of Town of Claresholm owned materials (fee reduced/waived)

**“Special Event”** shall be defined as any one-time or first-time event that is of cultural, social, or recreational significance to the community and which may have participation of more than one organization.

**“Community Event”** shall be a recurring event that Town Council has determined provides some significant benefit to the broad community, and is open to all members of the public.

**“Operational Grant”** shall be funding provided to assist non-profit community groups with yearly operating expenses. This would generally be amounts in excess of \$5,000 and recurring in nature.

## **Eligibility**

The following are eligible to apply:

- Individuals, groups, or organizations based in the Town of Claresholm;
- Are a non-profit entity;

### **Ineligibility**

The following are not eligible to apply:

- Recipients of other funds from the Town of Claresholm;
- A Federal or Provincially funded initiative;
- For-profit/private companies
- A registered political party, registered constituency association or registered political candidate;
- Individuals or groups raising funds on behalf of another group who would not otherwise be eligible;
- Any entity proposing activity that is contrary to the policies of the Town of Claresholm, or an activity which is deemed to be unlawful, or would incite hatred towards any group;
- Requests for assistance to attend conferences, and sponsorships of individuals or groups attending or participating in sporting events

## **Application Guidelines**

### ***Community Donations, In-Kind Contributions, Community Project Funding and Community or Special Events***

1. Requests of this kind will be accepted on an ongoing basis, and must be in writing to the CAO on the prescribed form (Schedule “A”, Application for Donation);
2. The applicant must demonstrate the need for the specific request, as well as effort to raise funds from sources other than the Town of Claresholm;
3. Successful applicants must:
  - a. Use or distribute the donation wholly within the Town of Claresholm through the events or activities associated with the donation;
  - b. Agree to acknowledge the Town contribution in all publicity relating to the event or activity to which the donation applies.

### ***Operational Grants***

1. All requests for Operational Grants shall be directed in writing to the CAO and must

include an itemized budget, detailing how the grant will be utilized and prior year financial statements. Returning applicants must provide a report detailing how the previous grant was utilized (See Schedule "B" for Application). Applicants may be requested to appear before Council to present their application;

2. To align with the Town's budgeting processes, Operational Grant requests must be submitted by the end of February;
3. The Town of Claresholm will only provide Operational Grant funding to organizations, groups or societies in the community, provided the organization, group or society has included a voting position on their Board for a Council appointed member/representative, and that the position is filled;
4. Council has deemed that Operational Grants to private causes or individuals, or, organizations, groups or societies for which there is no assigned Council representative, is an inappropriate use of municipal finances. If a request is received from an organization for which there is not currently a voting position on the Board for a Council appointed member, before any request would be entertained, the organization, group, or society would be required to create such a position as a condition of the funding.

#### ***General Guidelines for Council and Administration***

1. All requests should be assessed based on the availability of the requested resource, potential financial impact to the Town of Claresholm, contribution to the well-being of members of the community, recognition of a worthwhile program/cause, and overall community impact;
2. Council, at its discretion may or may not grant a request. There is no guarantee that a request will be approved;
3. Funding may not exceed the approved yearly budget amount unless by resolution of Council;
4. In approving donations/requests, Council may impose conditions and/or restrictions as it deems fit;
5. Council decisions are final;
6. 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. Each department will keep a detailed listing of all in-kind services offered in a calendar year and this will form part of the budget process;
7. Administration will provide a written response to each applicant after Council has made a decision;
8. Council approval is not a commitment that the Town will continue such donations or grants in the future.

#### **Requests for assistance outside scope of policy:**

Nothing in this policy prohibits Town Council from considering financial assistance or in-kind support outside the scope of this policy. Council will consider each case on its merit and any assistance provided will be without precedent.



**7. Previous Donations**

Has your organization received donation from the Town of Claresholm in the past? If so, please explain the amount and use of these donations.

Date	Amount	Use of Funds

**8. Organizational Information**

What services or activities does your organization provide to the Town of Claresholm residents? (Please attach a list of membership/executive)

---

---

---

---

Describe in broad terms the principal objective of your organization or initiative:

---

---

---

---

How will your organization acknowledge the Town's donation?

---

---

---

---

**10. Please provide a detailed list of all sources of funding for the organization.**

Funding Source	Amount	Recommended Use of Funds

**Town of Claresholm Application for  
Operational Grant**  
(Policy 5.1.01 – Schedule “B”)



**DUE ON FINAL BUSINESS DAY OF FEBRUARY**

Date of Application: \_\_\_\_\_

**Applicant Information**

Name of Applicant: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Phone, Fax, Email: \_\_\_\_\_

Amount Requested: \$ \_\_\_\_\_ Date funding is Required: \_\_\_\_\_

A complete application must include the following. Where applicable you may use the templates below or attaching separate documents:

- Description of Request (Rationale for Town Funding)
- Operating or Grant Budget for Period Grant is Being Requested
- Most Recent Annual Financial Statements (*Signed by two Board Members*)
- Report on use of prior year grant funding (most recent annual financials may be sufficient)

---

Cheque is payable to: \_\_\_\_\_

Applicant Name and Position: \_\_\_\_\_

Applicant Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**Please submit applications to:**

**Town of Claresholm  
111-55th Avenue W  
PO Box 1000  
Claresholm, AB T0L 0T0**

You may also email applications to **info@claresholm.ca**

The personal information collected on this form is collected for the purpose of determining eligibility for the applicant to receive support for an event or activity. The information is collected under Section 33(c) of the Freedom of Information and Protection of Privacy Act. Questions regarding the collection of this information should be directed to the FOIP Coordinator at the address noted above.

