

**Town of Saugeen Shores
Corporate Policy**

Community Donation Policy	
Department: Corporate Services	Prepared By: Clerks Division
Date of Passage: October 23, 2023	Res. No.: 244-2023, By-law No. 95-2023

Purpose:

The purpose of this policy is to provide a framework for the receiving of applications, making decisions and providing funding for non-profit and charitable organizations that support the quality of life of Town of Saugeen Shores residents. Funding under this policy may be for cash or in-kind donations.

Policy:

1. DEFINITIONS

“In-kind” shall mean donations from the Town for any support other than cash and may include, but is not limited to, Town facility rental fees, Town licence or permit fees, on-site staff labour, event set-up or tear down, meeting space, or storage space.

“Town” shall mean The Corporation of the Town of Saugeen Shores.

“Project” means any program, project, event, service, or activity for which a Community Investment Grant has been submitted.

2. POLICY STATEMENT

The Town of Saugeen Shores recognizes the essential role that non-profit and charitable organizations play in improving the quality of life of Town residents. The Town’s role in supporting these organizations is guided through the values and principles identified in the Strategic Plan.

The Town of Saugeen Shores wishes to provide financial assistance to non-profit organizations that have a positive impact on the quality of life in the community. The funds and in-kind donations shall be distributed in an open, fair and accountable process that is to the best benefit of the community.

3. FUNDING

The funding will be directed through five streams of:

- Arts, Culture, Heritage;
- Sports, Recreation;
- Social, Health, Environmental;
- Tourism;
- Diversity and Inclusion;
- Other;

and may be for any project that supports/sustains, promotes, informs/educates, celebrates, preserves and/or provides access to these areas.

The various streams include, but are not restricted to, the following:

Arts: creative activity by professionals or non-professionals in various fine and applied art forms including but not limited to: visual, performing and performance, literary, media, and decorative arts;

Culture: beliefs, customs and traditions of certain communities, societies, or cultural groups relating to language, ethnicity, race, gender, sexual identity, disability, religion, class, and diversity;

Heritage: identification, documentation, interpretation, or preservation of built heritage (structure, building or group of buildings, landscape), cultural heritage (archaeology, archives, genealogy, monuments, museums and galleries/collections), historic people and events, and traditions (customs and beliefs), that is not otherwise the mandate of the Municipal Heritage Committee;

Sports, Recreation: activities contributing to physical health and well-being including: participation in sports leagues, instructional sports, fitness and wellness activities, leisure and hobby activities;

Social, Health: programs and services supportive to the social determinants of health (state of complete physical, mental and social well-being with a focus on prevention; access to housing, food and clothing, freedom from violence);

Environment: beautification, conservation, documentation, interpretation, preservation, restoration, and research of the environment/natural heritage (air, water, flora, fauna, and natural landscape);

Tourism: attraction of visitors, promotion or encouragement of touring, growth of the Town's tourism, development of new and improved experiences for tourists, increase tourism activity;

Diversity and Inclusion: projects, events or initiatives to support and celebrate communities within Saugeen Shores that are otherwise underrepresented, develop and create welcoming experiences for new Canadians and those who have been marginalized and oppressed;

Other: projects outside other streams that contribute to the quality of life in Saugeen Shores.

The Community Donation Policy will not fund the following:

- individuals;
- for profit organizations;
- organizations that have a current signed agreement with the Town that states that they are not eligible for other Town funding sources;
- committees or local boards of the Town as they are already funded through the Town's Business Plan/Budget;
- other levels of government or their agencies;
- political organizations; or
- organizations whose activities may breach the Ontario Human Rights Code or Charter of Rights.

4. GENERAL TERMS

Council shall, annually, determine the amount of funds to be allocated to the Community Donation Policy through the budget process based on applications received.

It is intended that funds associated with the Community Donation Policy are for the benefit of the community and projects where funds go outside the Town are not eligible.

The annual budget process timelines vary and applicants need to take into account that approvals may not be granted in the time that suits their events or particular needs. The program shall provide a modest level of assistance to non-profit organizations in a fair and equitable manner. It is not the intent of this program to provide sustainable funding or to create long-term financial dependency. Organization must show exploration of other financial support and options (i.e. fundraising and volunteer support).

The policy shall be administered by the Corporate Services Department with responsibilities lying within both the Finance and Clerk's Divisions. Minor clarifications to this policy's intent and workings shall be subject to the interpretation of the Clerk and Treasurer for the Town of Saugeen Shores. The Clerk's Division is authorized to make minor adjustments to the application attached hereto as Schedule "A" and forming part of this policy. The Policy funding streams will be updated with the adoption of a new Strategic Plan to retain alignment between this Policy and Council's endorsed Strategic Plan.

Only one application per year will be permitted per organization. Incomplete applications

will not be accepted. The incomplete application will be returned to the applicant, with an explanation of the deficiencies, who may re-submit.

Grants must be used within the calendar year for which they were approved (i.e. approved in the 2024 Business Plan for 2025 funding means the funds are expended by December 31, 2025). If the project fails to proceed, the funds will not be disbursed. To receive the funding, a completed report (see Report Back Template in Section III) must be returned. If the project is delayed, the organization must provide a letter of explanation to the Town regarding the nature of the delay and the proposed new schedule. If the funds spent are less than the funds granted for the project, only the amount spent shall be disbursed.

This policy shall come into effect for the 2025 Business Plan. Requests for donations up to and including the 2024 Budget will follow existing practices of individual requests. For the 2026 Business Plan and beyond, late applications will not be considered. Requests for support of new projects only may be considered outside of the standard intake process. Applicants must submit an application for review by the Evaluation Team who will make a recommendation to Council. No request under the Community Donation Policy shall be scheduled as a delegation to Council.

5. MUNICIPAL REVIEW

Notice for the application intake period will be posted on the Town's website. The applications will be available beginning June 1 and must be forwarded to the attention of Clerk no later than September 1 of the year preceding the budget (i.e. June and September 2024 respectively for the 2025 Budget). The applications will be reviewed by Corporate Services staff for compliance with the Community Donation Policy. Applications will be further reviewed and evaluated by the Community Donation Evaluation Team comprised of a minimum of three representatives across different Divisions within the Town.

Applications will be assessed in terms of the need for the project, alignment with the Town's Strategic Plan, cost effectiveness, financial viability, contribution to the quality of life and sustainability in the community, community involvement/response, cooperative cost-sharing projects, past demonstrated fiscal responsibility of the applicant, and existing in-kind support from the Town (municipal staff support, loan of equipment, etc.).

The Evaluation Team shall provide Council with an evaluation of the proposals to include eligibility, scoring, impact on Town resources, previous years' requests, amount being requested, and budget impact. Council will make a determination of which requests will be forwarded to the budget/business planning process. Final approval of requests will be made by Council through the approval of the upcoming year's budget. Applicants will be notified of Council's decision.

6. ELIGIBILITY CRITERIA

In order to apply to the Donation Policy, applicant organizations and funding requests must meet ALL of the following eligibility requirements:

1. Both the organization and the investment sought must benefit Saugeen Shores residents.
2. The organization must be an incorporated not-for-profit organization. This means that it is incorporated under provincial or federal legislation, with or without charitable status.
3. The organization must have a volunteer board of directors with the exception of ex-officio members.
4. The organization has been in operation for at least one year.
5. The organization must have either a location in Saugeen Shores or over half of the participants be from Saugeen Shores.
6. The organization is in good standing with the Town and, if applicable, its own governing bodies.

6. INELIGIBLE ACTIVITIES

The following are not eligible for funding:

- flow through funding (where the intent is to directly re-distribute the same funds to others);
- deficit funding or retroactive funding (for past shortfalls);
- debt retirement or depreciation costs; or
- duplication of funding received from another source where total funding would exceed costs.

7. ACCOUNTABILITY

Applicants awarded a grant will be held accountable for the expenditure of the funds in accordance with the stated objectives/plans. Grants in future years will be reviewed based on past demonstrated fiscal responsibility of the applicants.

Funds granted under this program are not transferable between projects or organizations without prior Council approval and must be used for the specific purposes outlined.

An Accountability Statement must be completed and submitted within 60 days of the completion of the project / grant being used. The statement shall provide description of the completed project; a financial statement for the event listing all expenditures and revenues pertaining to the event/project, the use of the grant funds and an explanation of how the Town's contribution to the project has been recognized.

The Statement shall be signed by an authorized representative of the organization who

shall act as the main contact for any questions, re-submissions, or other such requirements.

Additional financial reports from applicants may be requested at the Town's discretion.

8. APPLICATION REQUIREMENTS

Applications must:

- be submitted on the prescribed form (Schedule "A" is attached for illustration of what will be included on the application, the application will be an online form with the capacity for printing a hardcopy);
- include a project budget (proposed expenses and other revenues);
- include the most recent audited financial statements for the organization;
- provide complete information concerning the project's objectives, services provided, operating costs, financing details, and an explanation of reasons for the funding need; and
- be submitted by the organization to the Town by the due date.

9. TOWN RECOGNITION

Recipients of cash or in-kind donations under the Community Donations Policy shall acknowledge municipal support in media coverage and printed material.

Schedule A

Community Donation Application

Section I: Application Eligibility

In which stream does your project, initiative, or event benefit the community?

Check all that apply:

- Arts
- Culture
- Heritage
- Sports
- Recreation
- Social
- Health
- Environmental
- Tourism
- Diversity and Inclusion
- Other _____

Legal Name of the organization:

Full Legal Address and Contact Information:

Street / PO Box: _____

City: _____ Province: _____ Postal Code: _____

Telephone: _____ Cell: _____ Email: _____

Main contact on project: _____

Type of Organization or Group: Check One

- Service Club
- Arts/Culture Event/Organization
- MUSH/Government Agency
- Community Service Provider
- LGBTQ2S+ Organization
- BIPOC Organization
- AAPI Organization
- Other-Specify

Is the organization registered with CRA as a charity? Yes No

Is the organization incorporated as a non-profit with the Province? Yes No

What is the mandate or main purpose of your organization or group?

Who is your organization's or group's audience / who does your organization or group serve?

Section II: Funding Details

Amount of request and/or details of in-kind support: _____

Select the type of support you are applying for:

- One-Time Event
- Multi-Year Event
- One-Time Project
- Multi-Year Project
- One-Time Initiative
- Ongoing Initiative (will not be funded)
- Unique Need

Have you received funding from the Town before? Yes No

If Yes, indicate the amount, in-kind details, and year received: _____

Have you submitted a final report? Yes No

Section III: Project or Event Details

Please describe your Project or Initiative: _____

Please indicate the project goals: _____

Section IV: Project Budget

Project Name: _____

Revenue Sources

Amount

Total Revenue (A)

Fundraising Sources

Amount

Total Fundraising (B)

Government Funding Sources

Amount

_____	_____
_____	_____
Total Government Funding (C)	_____
Expenditures	Amount
_____	_____
_____	_____
_____	_____
_____	_____
Total Expenditures (D)	_____
Budget Overview	
Project Revenue	
Total Earned Revenue (A)	_____
Total Fundraising Revenue (B)	_____
Total Government Revenue (C)	_____
Total Project Revenue (A+B+C=E)	_____
Total Variance (E-D)	_____

Evaluation – Community Grants Evaluation Matrix

Scoring Criteria	Score
The project, initiative or event will serve the local interests of the residents of the Town of Saugeen Shores and will uphold the Corporation’s strategic values. (20 Points maximum)	_____pts
The project, initiative or event will contribute to the community through the chosen granting streams of Arts, Culture, Heritage; Sports, Recreation; Social, Health, Environmental; Tourism; Diversity and Inclusion; or Other. (20 Points maximum)	_____pts
The project, initiative or event provides access to the Arts, Culture, Heritage; Sports, Recreation; Social, Health, Environmental; Tourism; Diversity and Inclusion; or other equally, for as many residents as possible. (20 Points maximum)	_____pts
The project, initiative or event demonstrates broad support by way of having adequate funds and support from other sources and stakeholders and/or significant evidence of broad community support. (20 Points maximum)	_____pts
There is clear alignment between the project, initiative or event and its’ intended goals. (10 Points maximum)	_____pts
The project, initiative or event has other innovative, creative thinking attributes. (10 Points maximum)	_____pts
Total (100 Points maximum)	_____pts

Report Back Template

A final report is required to be submitted to the Clerk within 30 days following the project / initiative end date and/or agreed upon date by the recipient and the clerk. The final report is required to receive the Community Donation funds from the Town.

Name of organization: _____

Did your project, initiative or event contribute to community through the granting streams of Arts, Culture, Heritage; Sports, Recreation; Social, Health, Environmental; Tourism; Diversity and Inclusion; or Other? Please explain how:

How did the grant help you to achieve your project, initiative or event goals? Please explain how:

How did your project, initiative or event impact the Town of Saugeen Shores Community in a positive way? Indicate how this happened in relation to improving the quality of life in Saugeen Shores for all residents. Speak in relation to the areas of Arts, Culture, Heritage; Sports, Recreation; Social, Health, Environmental; Tourism; Diversity and Inclusion; or Other. Please explain:

How was the Town of Saugeen Shores recognized in the course of your project or initiative? Please explain below:

Is there anything else you would like us to know about your project or initiative? Please comment here:

Section V: Application Signature

I certify that the information supplied in this application is, to the best of my knowledge, exact and complete, and that the project has received the approval of the organization I represent.

Name: _____ Signature: _____

Title: _____ Date: _____

Please note: Completed applications are due to the Clerk by 4:30 p.m. on or before June 1 for consideration in the next funding year.

Return completed form to:

Clerk
Town of Saugeen Shores
600 Tomlinson Drive, Box 820
Port Elgin, Ontario N0H 2C0