

MUNICIPALITY OF THE DISTRICT OF YARMOUTH

GRANTS POLICY G-068-09

Effective Date:

July 22, 2009

Part 1 OBJECTIVE:

To develop a process to provide financial assistance for not-for-profit organizations, groups and associations that are providing meaningful support services to the communities within the Municipality of Yarmouth. The financial assistance is intended to recognize the value of these services and offset some of the financial burden borne by the community organizations. Each year, the Municipality receives applications for more funding than is available. The intent of this policy is to ensure equal opportunity to participate in the funding available and to establish predetermined standards that are clear to all applicants.

This policy does not cover:

- Grants to Volunteer Fire Services
- Tax exemptions
- Tax rebates
- Recreation grants
- Bursaries

Part 2 AUTHORITY:

Authority for this policy is provided under Section 65 of the Municipal Government Act (MGA).

Part 3 PROCESS:

- 3.1 Application process will open on January 1st and close on April 15th of each year. Applications received after the deadline and throughout the fiscal year will be referred to the budget process for the following fiscal year. An amount of \$7,500.00 of the grants budget will be set aside as a contingency. Applications received after the deadline will only be considered if the applicant can show that the need is urgent and could not reasonably have been anticipated prior to the beginning of the fiscal year and no other sources of funding are available.
- 3.2 Once decisions are made on grant applications, all applicants shall receive a letter of acknowledgement. Letters for successful applicants will include terms of grant – amount, disbursement schedule, requirement for final report;
- 3.3 Applications must be submitted on the form provided on the Municipality's website. All applications, prior to review, are required to be complete with all

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supporting documentation provided and verified, if deemed necessary. Council, at its discretion may choose not to review applications which are incomplete or do not contain all necessary financial information. Sample of Financial information required;

- 3.4 Grant recipients must provide a final report and financial statement upon completion of the project. Failure to do so may make them ineligible to apply for funding the following year;
- 3.5 Council may place certain conditions on funding, which would be outlined in the letter of approval;
- 3.6 There is no appeal process;
- 3.7 If there is a surplus of funds or cost is less than original estimates, council may review and revise amount of grant;
- 3.8 Council reserves the right to issue grants in installments; grants over \$2000 may be issued in 2 installments – 75% upfront, and the remaining 25% upon receipt of final report;
- 3.9 Multi-year grants can be approved in principle, however may be subject to a series of stated deliverables;
- 3.10 Any changes to the purpose of the grant originally outlined in the application are not permitted unless approved beforehand by council;
- 3.11 Council reserves the right to place restrictions on the amount granted;
- 3.12 Each year the Municipality will publish a list of approved grants as per section 65 (au) of the Municipal Government Act.
- 3.13 It is understood that grant approval by Council pursuant to the grant process is for the current year and is to be expended in the fiscal year in which it was awarded. Only under special pre-approved circumstances, may grant funding be held and disbursed beyond the fiscal year end.

Part 4 PRINCIPLES:

There are three types of financial assistance which may be granted:

MUNICIPALITY OF THE DISTRICT OF YARMOUTH

GRANTS POLICY G-068-09

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- 4.1 **Operating** – intended to cover expenses associated with starting and operating a program and/or service;
- 4.2 **Capital** – enable the group, association or organization to acquire capital equipment and/or capital improvements;
- 4.3 **Tourism**- Assist with tourism related projects designed to protect, and enhance community identity, values and tourism products.

Council is committed to treating organizations, groups and associations in a fair and consistent manner and as such the following criteria will be applied:

Part 5 ELIGIBILITY:

- 5.1 Only not-for-profit charitable groups and organizations are eligible for grants;
- 5.2 Grants shall be restricted to organizations, groups and associations who are providing a service to the Municipality of the District of Yarmouth and area residents;
- 5.3 Applications from religious organizations and political organizations will not be entertained unless it is with respect to a Heritage Building or recreational facility;
- 5.4 Applications for capital grants over \$1,000 must, where applicable be accompanied by at least two (2) quotes for costs;
- 5.5 Request for major projects (over \$10,000)
 - 5.5.1 Funding may be considered up to a maximum of 10% for operating costs and applicant must show funding from other sources;
 - 5.5.2 Funding may be considered up to a maximum of 25% for capital costs and applicant must show funding from other sources;
- 5.6 Applicants must have completed and submitted any outstanding reports to Council for past grants.

MUNICIPALITY OF THE DISTRICT OF YARMOUTH

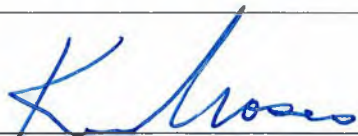
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Grant applications will be reviewed against some of the following criteria:

- Demonstrated fundraising efforts
- Social and economic benefits accrued by the community balanced against other competing priorities and available funding
- Community benefit and impact
- Economic benefit and impact
- Safe and secure environments
- Goals and mandate of the Municipality
- If more than one organization or group submits an application for the same or similar service, Council may decide to share the grant among applicants.

Part 6 EFFECTIVE DATE:

This policy shall take effect on the date that the policy is approved by council. All organizations submitting applications for funding assistance will be evaluated on the basis of this statement of policy from that day forward.

Chief Administrative Officer's Annotation for Official Policy Book	
Date of Notice to Council members of Intent to Consider (7 days Min)	June 8, 2016
Date of Passage of current Policy	June 22, 2016
I certify that this <i>Name of Policy</i> was adopted by Council as indicated above.	
 <hr/> Chief Administrative Officer	June 23, 2016 <hr/> Date

Date last reviewed: June 22, 2016

Date last amended: June 22, 2016

Date last reviewed by the By-Law and Policy Review Committee: June 8, 2016

Please return completed application to:



The Municipality of Yarmouth
932 Highway 1
Hebron, NS B5A 5Z5

Email: admin@district.yarmouth.ns.ca
Website: www.district.yarmouth.ns.ca
Telephone: (902) 742-7159
Fax: (902) 742-3164

APPLICATION DEADLINE IS April 15th of each year.

Specify which category for which funds are being requested:			Operating	Capital	Tourism
Organization:		Name of Contact:			
Physical and Mailing Address:		Phone: ()		Fax: ()	
		Email:		Website:	
Nature of Organization: (i.e. Registered/Not for Profit, etc.)					
Years in Operation:					
Has your organization received a grant from the Municipality of Yarmouth in the past? _____ Yes _____ No			If yes, amount previously granted: \$ _____		
Total Project Budget, if applicable: \$ _____			Amount of this Request: \$ _____		
Briefly describe your organization and what you would consider your mandate:					
Describe why you believe this grant is necessary and what it would be contributing to our residents and surrounding areas as well as any necessary project information, if applicable:					
Please attach a copy of the current full listing of your organization's officers and directors (Available from the Registry of Joint Stock Companies, if applicable)					

IMPORTANT: Please include a copy of your most recent financial statement, a budget for your upcoming fiscal year, details of anticipated costs of any specific project/program/expenditure that this request relates to, if applicable; as well as any other such information your organization feels pertinent. Please refer to Municipal Grant Policy #G-068-09 which is available on our website at www.district.yarmouth.ns.ca

If your organization does not have a financial statement or budget process, you will find attached a template to help you provide the financial information that we require. Please make sure in your financial information, other funding/sources/ partners are clearly shown.

REPORT TO COUNCIL - HOW WAS YOUR EVENT AND HOW WERE THE FUNDS SPENT?

Following the event it is required that you provide a brief report regarding the project and financial statements for the project showing how the grant money was spent. Please forward the report to the Municipality of Yarmouth marked "Grant Report". Future funding considerations will only be given subject to the receipt of financial reporting being received.

If a follow-up report is not received, future requests may be affected.

SIGNATURE OF SIGNING OFFICERS: We certify that the information included in this application is accurate.

President/Chair: _____ Second Officer: _____

Date: _____ Date: _____

FINANCIAL STATEMENT
 Or if **PROJECT SPECIFIC**

Period _____ to _____
 Project name _____

OPERATING REVENUES/ FUNDING SOURCES	Annual or Project Budget	Remarks
Bank balance from previous year		
Operating revenues		
FundRaising		
Grants, sources		
Other funding sources		
Other		
Other		
TOTAL	\$	

OPERATING EXPENDITURES	Annual or Project Budget	Remarks
Loan Payments		
Telephone/internet		
Heat/Lights/utilities		
Repairs/maintenance		
Interest & service charges		
Insurance		
Office and admin		
Equipment and supplies		
Payroll & benefits		
Miscellaneous		
Project specific		
Project specific		
Project specific		
Total Expenses	\$	