City of Merritt Council Policy

Council Policy: Community Grant in Aid

Category No. 05 - ##

Contact Department: Finance

1. PURPOSE:

The purpose of the community Grant in Aid program is to improve the well-being and quality of life of the community and its residents, through financial assistance to non-profit community-based organizations which provide meaningful programs and services in the arts, culture, heritage, recreation, sport, environment, health, and social services areas.

2. OBJECTIVE

The objectives are:

- Support for not-for-profit organizations serving the City of Merritt;
- Strengthen and enhance the well-being of our community;
- Promote volunteerism;
- Meet the goals and objectives of the City's Official Community Plan and Council Strategic Plan;
- Provide a fair, consistent, effective and efficient evaluation process; and
- Promote transparency and accountability.

3. POLICY

3.1 Council will establish a budget for allocating Grant in Aid in a calendar year. The amount of the budget will be reviewed annually as part of the budget deliberation process.

3.2 A Grant in Aid should not be used for any other form or section of a taxing or local government authority, such as School Districts, Regional Districts, Hospital, etc., or organizations or functions that are primarily funded by other levels of government.

3.3 A Grant in Aid must not be provided to an "industrial, commercial or business undertaking."

3.4 Organizations may be considered for either a Community Grant in Aid or Permissive Tax Exemption.

3.5 The Financial Department will advertise annually in October the criteria for Grant in Aid with a December 15th deadline for submissions to be considered for a grant in the following calendar year. Applications received after the December 15th deadline will be considered an Extraordinary Grant in Aid. Applicants are required to submit a description of their service/program/event, financial statements for the previous year, and a listing of other funding sources. Applicants must demonstrate that the funds will be used for a program of benefit to the community and that the group is unable to raise all of its required funds from other sources.

3.6 A Committee of Council will review the submissions for Grant in Aid and make recommendations to the Committee of the Whole during budget deliberations. Funds are allocated at Council's discretion and a complete application package must be submitted for consideration. Council will

make a final decision on the approved Grants in Aid by March 1st each year, with notification given to all of the applicants immediately thereafter. Council may set aside a portion of the Grant in Aid budget for allocation to Extraordinary Requests during the year.

3.7 Representatives of the organization requesting the Grant in Aid are required to respond to any requests for further information by staff, in preparation for Council consideration. Council may request further information during deliberations.

3.8 The Finance Department will respond once to organizations that have submitted an incomplete Grant in Aid application. If there is no response from the organization prior to the Committee meeting in which applications are reviewed, the Grant in Aid application will not be considered by Council.

3.9 Grants in Aid are not intended to provide ongoing support and all approvals shall be considered on a year-to-year basis and continuing support should not be anticipated. Grant in Aid is meant to support a specific program or initiative, and as such this should be well outlined in the application package. It is not meant to support annual operations.

3.10 A report to Council is required by the end of the year in which funding is received detailing how the funding was used and how it benefited the community. Failure to file a report will result in no further consideration by Council for future requests from the organization.

3.11 Council may request the return of any unspent funds from the organization.

3.12 Organizations receiving grants will keep records which meet generally accepted standards of good business practice. For the purpose of this policy, the determination of those standards will be wholly at the discretion of the City of Merritt or its auditors. The organization's financial records must be made available to the City or its auditors as may be requested from time to time. If, upon examination of the financial records, they are deemed inadequate the Council may request the funds be returned and/or the Council may at its discretion disqualify the organization from all subsequent lease, license to use, rent, tax exemption, cash or in-kind assistance from the City.

3.13 Where the value in-kind portion of a grant includes the use of a facility or amenity, the City reserves the right at any time to substitute an appropriate alternate facility or amenity, or dates at its sole discretion.

4. CRITERIA

4.1 Eligibility

In order to qualify for a Community Grant in Aid the applicant must:

- Be a registered not-for-profit organization in good standing with the Registrar of Companies.

Services, projects or events proposed by the applicant must not:

- Offer direct financial assistance to individuals or families.
- Duplicate or replace services that fall within the mandate of senior levels of governments or local service agencies.

- Support a Provincial or National fundraising campaign.
- Be of a commercial nature.

4.2 Grant Guidelines:

a) Grants in Aid are provided to non-profit and community groups on the basis that they provide valuable programs to the community and are unable to raise all their required program/project funding without the City's assistance.

b) Grants in Aid will be used to encourage innovation that has the potential to support or contribute towards the community and the goals of Council. This includes one-time start-up for initiatives or programs which will support or contribute to the community. As well the initiative funding is to assist groups who are hosting a special event or organizing the inaugural of what is intended to be a regular event in Merritt.

c) Grant in Aid funding will not be provided to fundraise for a charity or an organization other than the applicant.

d) All requests must indicate whether requests for the current year have been submitted to other organizations or levels of government. All requests must indicate whether partnerships with other agencies have been investigated.

e) All requests must indicate other fund-raising activities, with details of when these will occur, other funding bodies applied to, and other sponsors.

f) If the organization is forecasting a surplus, or demonstrated a prior surplus in their financial statements, the intended use of any surplus funds must be explained in the application.

g) Grant recipients must acknowledge funding support from the City of Merritt in all communications materials, media coverage, and verbal promotion pertaining to the program/project being supported by the grant. Evidence of acknowledgement must be included in the reporting form.

h) Grant recipients agree that all related communication materials, including signs, websites, posters, etc. will contain a visible and current City of Merritt logo. Current files are available through the Communications and Engagement Manager and must be used in accordance with the City's policy. The City of Merritt logo should only be used in reference to the program/project supported by grant funding.

i) Grant recipients are encouraged to tag the City of Merritt in social media posts in recognition of grant support.

j) For all promotion, communication and acknowledgement of the City, the primary contact with the City is the Communication and Engagement Manager.

k) Notwithstanding the previous section, the program/project may not be represented as a program/project hosted by the City of Merritt, nor may the organization hold itself out as an agent of the City of Merritt in any way.

l) Successful applicants agree to have their name or society name, project name, and the amount of assistance published by the City on media releases, websites, or in any other medium desired by the City.

m) Council will disperse approved Grant in Aid funds:
   - In advance at the discretion of Council, or at another time specified by Council during the approval process.
   - 50% at the time of approval and 50% upon the receipt of the final reporting.

4.3 Evaluation Criteria

- Community Need – 20%
  - Evidence of community need. Services are not currently provided elsewhere or are not sufficient.

- Potential Community Benefit – 20%
  - Widespread benefit and contribution to the well-being of the community in general.

- Community Partnerships and Support – 15%
  - Organization has partnerships within the community and support from other sources (financial and in-kind).

- Feasibility – 15%
  - Ability of the organization to deliver the proposed program, project, service, or event- e.g. sufficient volunteers, appropriate venue.

- Public Access – 10%
  - E.g. hours of operations, facilities available to the general public as well as members, and provision of needed equipment (maybe for a fee).

- Financial Management – 20%
  - Evidence of financial need and appropriate records provided.

4.4 Reporting and Return of Funds

The City requires all organizations receiving municipal grants to complete a reporting out form and submit it with required documentation within six weeks of their program or project completion. All reporting out forms must be received by the annual deadline of October 31. If a program or project is not completed in time to meet the deadline, the organization must submit before the deadline a request for an extension to the attention of the Finance Department. The reporting out form is attached to this policy and will be provided to organizations at the time of notification of receiving the grant.

In order to be eligible to receive a grant in aid in subsequent years, all organizations are required to submit the reporting out form.

In the event that grant funds are not used for the project/program indicated in the application the organization hereby acknowledges that:

If all or part of the funds remain unspent, the funds must be returned to the City to the attention of the Finance Department.

If funds have been expended inappropriately or for a purpose other than the program/project indicated in the application, Council may at its discretion disqualify the organization from all subsequent lease, license to use, rent, tax exemption, cash or in-kind assistance from the City.

5. FUNDING CLASSES

- Financial Aid:
  Grant in Aid applications that include a request for financial assistance for programs or events.

- In-Kind:
  Grant in Aid applications that include a request for the in-kind use of a City owned facility.

Approved on	2012/11/06
Amended on	2014/10/31
Amended on	2017/11/14
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Amended on	2023/07/25
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