

Request for municipal funding

Responsible Department: Community Services

Council Approval Date: June 21, 2023

Council Resolution Number:

Statute(s) and Bylaw(s):

1. POLICY STATEMENT

The Town of Diamond Valley is committed to empowering citizens to initiate, plan and host events or implement projects, which benefit the community. The Town of Diamond Valley Community Support Grant will provide guidelines to manage requests from individuals or organizations related to the planning, promotion and implementation of special events or projects, sponsorship or marketing initiatives.

1.1. Legislative Requirements

This policy is subject to any specific provision of the *Municipal Government Act*, RSA 2000, Chapter M-26, as amended from time to time, or other relevant legislation or agreements.

2. Purpose

- 2.1. To provide financial resources to assist the community in building capacity, and execute projects which are of benefit to residents and businesses.
- 2.2. To increase and enhance awareness of the Town of Diamond Valley and encourage visitation.
- 2.3. To attract investment and tourism revenue in support of local businesses and the community.
- 2.4. To provide a platform from which to showcase the local culture, quality of life and opportunities.
- 2.5. To ensure transparency and accountability for the use of public funds.
- 2.6. To clarify, prioritize and communicate Council's involvement in fundraising events, specifically charity golf tournaments and initiatives held to raise funds for the purpose of supporting a non-profit organization's programming.

3. Definitions

- a. *CAO* means the Chief Administrative Officer of the Town of Diamond Valley.
- b. *Department Manager* shall mean the Community Services Manager or the person who oversees the duties, activities, and business dealings of one or more employees of the Town of Diamond.
- c. *Request for Decision (RFD)* means a document placed on a Council meeting agenda, by Administration, to provide Council with information about a matter requiring a decision of Council.
- d. *Town* means the municipal corporation of the Town of Diamond Valley
- e. *Town Council (Council)* means the duly elected Council for the Town of Diamond Valley.

4. Eligibility Criteria

Applications must demonstrate the following, where applicable:

- Clear community benefit; must be in the broader public interest of the residents as a whole
- Build and strengthen community capacity and pride
- Increase awareness of Diamond Valley and draw visitors from outside of the community
- Promote the municipality as a destination for visitors, new residents or business investment
- Encourage community participation, collaboration, volunteerism and partnerships
- How support of activities taking place outside the community will benefit the community

5. Discretionary Considerations

- 5.1** In consideration of public interest, the Town may exercise discretion in approving applications which fall outside the general intent of the program, based on the extent to which the applicant can demonstrate the project's potential and vital contributions to the community.

6. Funding Conditions

- 6.1** Generally, funding should not be used to fund private or commercial sector facilities. Exceptions may be made at the discretion of Council.
- 6.2** The applicant must ensure permissions are granted should the event be held on property not owned by the organization.
- 6.3** The applicant bears ultimate planning, coordination and operational responsibility for the project. All permits and contracts are the responsibility of the applicant.
- 6.4** In the event the funding supports a capital project owned by the applicant, the grant recipient may be required to repay the Town of Diamond Valley a portion or all of the grant amount if the project, property or facility is sold or leased to another party within five years of the issuance of the grant.
- 6.5** Applicants must provide recognition of Town of Diamond Valley's contribution to the project as outlined by the Community Services Manager.
- 6.6** The grant recipient must establish and maintain proper accounting records of the project.
- 6.7** The applicant must request approval from the Town in writing if the nature of the approved project in the original application changes.

7. Criteria Specific to Charity Fundraising Initiatives

- 7.1** Applications will be evaluated and ranked based on the following criteria:

Priority 1. Community benefit: Funds raised as a result of the event must directly support local initiatives

Priority 2. Regional benefit: Funds raised as a result of the event must support regional initiatives which are currently supported by the Town of Diamond Valley

7.2 Council and staff participation ranked in order of priority:

1. Mayor
2. Councillors
3. Chief Administrative Officer or designate
4. Department managers or designate

8. General Items Relating to Policy

- 8.1. Exclusions: funding under this program is limited to locally operated or supported, non-profit organizations or businesses associated with such (charity event). Projects eligible for Family and Community Support Services funding or supported through the Town of Diamond Valley annual budget allocations or requisitions, are not eligible for funding under this program.
- 8.2. Budget: to be provided with the application identifying sources of revenue (secured and potential) and projected project/event costs.
- 8.3. Responsibilities; the Manager of Community Services , or an assigned designate, is responsible to ensure the criteria and conditions of this Policy are met.
- 8.4. Related information: Procedure #

9. Application Deadlines

9.1 Community Support Grant applications will be reviewed four times per year:

Submission deadlines are:

- January 31
- March 31
- June 30
- October 31

- a. All projects must be completed prior to December 31 of the same year.
- b. Notification requirement: Town administration will notify applicants of the status of their application within two weeks of receipt and within one week of a decision by Council.

10. Policy Responsibilities

10.1 Council:

- a. shall approve, by resolution, this policy and any amendments;
- b. consider the allocation of resources for successful implementation of this policy in the annual operating and capital (if applicable) budget; and
- c. shall require the Chief Administrative Officer to obtain authorization of Council for any requests to increase the annual funding amount allocated to the program.

10.2 Chief Administrative Officer:

- a) Shall review all requests for decision proposed for presentation to Council related to this policy
- b) Shall establish an annual program budget
- c) Shall establish procedures related to the process and management of the Community Event Support Policy.
- d) May further delegate this authority to other Town staff members as he/she deems appropriate.

10.3 Manager of Community Services

- a) shall ensure a process to manage inquiries, applications, approvals and allocations of funds is developed and communicated.
- b) is responsible for communicating changes and amendments, providing training, and documentation of how to administer the Community Event Fund program efficiently and effectively;
- c) shall prepare quarterly reports; and
- d) shall ensure this policy and procedures are reviewed every three years, and make recommendations to the Chief Administrative Officer for necessary amendments as required.

11. Related Information

- Appendix A: Community Support Grant Procedures
- Appendix B: Community Support Grant, Request for Funding Application Special Events or Projects
- Appendix C: Community Support Grant Application: Fundraising Initiative, Sponsorship or Donation Request
- Appendix D: Community Support Grant Application Budget
- Appendix E: Community Support Grant Post-Event/Initiative Report

MAYOR

CHIEF ADMINISTRATIVE OFFICER

Responsible Department: Community Services **Procedure:** Policy # 2023 -

Effective Date:

CAO Approval: _____ **Corresponding Policy:** _____

1. Legislative Requirements

This policy is subject to any specific provision of the *Municipal Government Act*, RSA 2000, Chapter M-26, as amended from time to time, or other relevant legislation or agreements.

2. Responsibilities

The Community Services Manager or designate will:

- Advertise and promote the program
- Accept, review and evaluate applications
- Communicate with the applicants throughout the process to ensure information is complete and process is understood and followed
- Prepare Request for Decision for Council
- Notify applicant of Council's decision
- Prepare documentation as required
- Track and report financial information and program outcomes to Council

3. Confidentiality of Information

3.1 Release of information is subject to the *Freedom of Information and Protection of Privacy (FOIPP)*. Town employees will not release any information made available to them in their role of employee unless that information is public and available upon request.

3.2 Any information made available to a potential vendor, which may influence other vendors' responses, must be made available to all potential vendors.

3.3 Pursuant to the Town's obligations and duties under the FOIP Act, the Town commits to protect confidential information from unauthorized access or disclosure, especially information of a confidential nature that is clearly marked as such.

4. Application Process/Instructions

Applications for Community Support Grant funds will be reviewed initially by the Community Services Manager or their delegate, four times annually. Funds are issued once per year per applicant. Once the Community Support Grant fund allocation for the year has been awarded, no further applications will be considered until Council makes further funding available the following year.

- 4.1 Application process: All grant applicants will be required to file a Community Support Grant Application form, which is available through the Town of Diamond Valley website and submitted as outlined. Incomplete applications will not be accepted. Applications must include a current income statement for the project, an outline of the proposed project and implementation plan with timelines for execution.
- 4.2 The applicant shall ensure that any attachments provided are clearly marked with the organization's legal name to facilitate matching their backup documents with the application.

5. Branding Agreement

Successful applicants must agree to use the Town of Diamond Valley logo/branding in all public communications relevant to the funded project.

6. Post-event Report: Funding Accountability Reporting

- a. A Post-event Report will be submitted within 60 days of the completion of the initiatives. This will include a Funding Accountability report (income and expense statement) and narrative for the project outlining how funds were spent. See Appendix B
- b. The Funding Accountability Report must accompany the Post-event Report of the completion of the initiative. The Community Services Manager will be responsible for tracking the received report and providing the same to the Town of Diamond Valley Chief Administrative Officer and Council for the purposes of deeming whether applicants are eligible for future funding. Failure to provide this report will result in denial of other funding associated with the fund. The Town of Diamond Valley reserves the right to withhold or reclaim funds and to decline any subsequent requests for funding through the Community Support Grant fund, at its discretion.
- c. The Town of Diamond Valley may, at its discretion, request access to the financial records of successful applicants awarded financial support over \$10,000. By accepting an award of over \$10,000 applicants agree to provide immediate and complete access to financial records if/when requested by The Town of Diamond Valley.
- d. Any unused portions of Community Support Grant awards must be returned to the Town of Diamond Valley, no later than the date of submission of the Funding Accountability Report.