



**THE CORPORATION OF THE CITY OF VERNON**  
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## Corporate Policy


Section:	Finance	
Sub-Section:		
Title:	Council Discretionary Grant Policy	

### RELATED POLICIES

Number	Title

### APPROVALS

POLICY APPROVAL:	AMENDMENT APPROVAL:	SECTION AMENDED
Approved by: <i>"Wayne Lippert"</i>  Mayor Date: November 13, 2007	Amendment Approved by: <i>"Wayne Lippert"</i>  Mayor  Date: June 9, 2008	Updated Sec. 1.3© to include "excluding tax exemptions."
	Amendment Approved by: <i>"Rob Sawatzky"</i> Mayor  Date: November 26, 2012	"Remove clause noting that unspent funds in one fiscal year are rolled over to the next year."
	Amendment Approved by: <i>"Rob Sawatzky"</i> Mayor	"Amend intake periods, remove application form, and perform various housekeeping"

	Date: July 15, 2013	updates and changes."
	Amendment Approved by:  "Akbal Mund" Mayor  Date: March 12, 2018	"Amended paragraph under Policy. Amended Capital Expenditures, Intake Period, Project under Definitions and added Program. Amended 1.2 (d) and (e) and 2.2, 2.2.1 and 3.1 (e) Removed last sentence"
	Amendment Approved by:  "Victor Cumming" Mayor  Date: June 8, 2020	"Section 4.0 (Recipient Reporting) was added."
	Amendment Approved by:  "Victor Cumming" Mayor  Date: May 28, 2021	"Section 2.1 (b) amended to remove the words <b>set of</b> and change to <b>completed fiscal year and</b> and add <b>within the last 2 years</b> "

**POLICY**

The City supports the enhancement and preservation of a positive quality of life for all its residents. One means of achieving this goal is through the provision of grants to organizations that contribute to the general interest and advantage of the City.

The awarding of grants is solely within Council's discretion; Council may deny any and all grant requests.

This policy is in effect subject to the continuance of ongoing annual funding.

Organizations requesting \$25,000 in a single year must submit, at their expense, audited financial statements to the City.

## DEFINITIONS

**Application** means the documents listed in Section 2.1

**Application Deadline** means the 30<sup>th</sup> day of April and the 31st day of October.

**Capital Expenditure** means providing an asset in the City of Vernon that is significant and is of lasting benefit.

**Community Based** means a non-restricted membership group or organization:

- (a) whose practices are consistent with the City's Strategic Directions; and
- (b) who provide program(s), project(s) or capital expenditure(s) which positively and directly impact the City or its residents.

**Intake Period** means that applications will be accepted April 1 to April 30 up to 4:00pm and October 1 to October 31 up to 4:00pm, or if City Hall is closed on the due date, the next working day that City Hall is open up to 4:00 pm.

**Project** means a one-time event.

**Program** means an ongoing initiative by an organization. Funding preference will be given to startup programs.

**Regional Funding** means a funding source from surrounding communities or the regional district.

**Resident** means an individual who resides in the City.

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## PROCEDURES

### 1.0 *Eligibility for Grants*

- 1.1 An organization wishing to be considered for a discretionary grant will have to submit an application.
- 1.2 Each year, the City may award discretionary grants to organizations for the purpose of providing funding for a program, project or capital expenditure. An organization must meet the following criteria in order to qualify for a grant:
  - (a) The organization must be a non-profit organization or registered society;
  - (b) The organization must be Community Based;
  - (c) The organization is providing a service which is not provided by any other group or organization within the City or which is provided for in another municipality and is used by Residents.

- (d) The organization may only submit one application per calendar year.
- 1.3 An organization is not eligible for a grant and the request will be denied if the grant:
  - (a) Is for retroactive funding or to cover a deficit.
- 1.4 Preference will be given to organizations who are not receiving local government funding such as:
  - (a) Regional funding
  - (b) Grants or other assistance from the City of Vernon, excluding tax exemptions.

## **2.0 Application Process**

- 2.1 The organization must submit the following documents which form the application to apply for a grant:
  - (a) A signed, completed application form;
  - (b) The most recent completed fiscal year financial statements within the last 2 years;
  - (c) The minutes of the most recent annual general meeting;
  - (d) A list of the members of the executive (including positions held, address and contact numbers);
  - (e) Confirmation of registered society status.
  - (f) A profile and history of the organization and its accomplishments.
- 2.1.1 Incomplete applications will not be considered.
- 2.2 The organization must submit the application to the Director of Financial Services, at Vernon City Hall no later than 4:00 pm on the application date(s), or if City Hall is closed on that day, no later than 4:00pm on the next working day that City Hall is open.
  - 2.2.1 Applications for funding will be made on a semi-annual basis for those applications received between the intake periods of April 1 to April 30 4:00pm and October 1 to October 31, 4:00 pm each year, or if City Hall is closed on the 30th of April or the 31st of October, no later than 4:00 pm on the next working day that City Hall is open.

An application received before or after the application deadline will be returned to the applicant.
- 2.3 The Finance Division will:
  - (a) Review all applications to ensure policy compliance; and
  - (b) Forward the applications to the Finance Committee for consideration and recommendation to City Council.

- (c) Where funds have been exhausted for the current fiscal year the Director of Financial Services will advise the applicant by letter, and forward a copy of the notification to Mayor and Council.

### **3.0 Council Consideration**

- 3.1 The Finance Committee will consider the following factors when making recommendations to Council as to which organizations it will support or deny a grant:
  - (a) The extent to which an application demonstrates that there is need in the community;
  - (b) The extent to which the profile and history of the organization and its accomplishments and organization's goals and objectives are supportive of, or align with the City's Strategic Directions;
  - (c) The degree to which the grant will support the enhancement of a positive quality of life for all City Residents;
  - (d) The extent to which the organization has obtained other sources of funding (e.g. Federal or Provincial Government funding, corporate sponsorships, fundraising campaigns, etc.);
  - (e) The availability of funds budgeted for discretionary grants;
  - (f) The need(s) of the organization requesting funding;
  - (g) The degree of demonstrated economic development, environmental stewardship or social benefit that may be generated by the award of a Council Discretionary Grant.

### **4.0 Recipient Reporting**

- 4.1 The Finance Committee will correspond with organizations that have received a discretionary grant within twelve months of receipt to ensure that the awarded grant funds will be spent.
- 4.2 Organizations that have received a discretionary grant must submit a report to the City within two years of receipt disclosing details on how the grant funds were spent. If none of the grant was spent, the grant must be returned to the City within two years of receipt.
- 4.3 If the above requirement is not followed by an organization receiving a discretionary grant, subsequent applications from that organization will not be approved.