



# **TOWN OF MARYSTOWN**

## **Donation, Grant and Sponsorship Policy**

<b>Approval Date:</b>	June 4, 2018
<b>Effective Date:</b>	June 5, 2018
<b>Date Last Reviewed:</b>	N/A

### **PURPOSE**

The Town of Marystown recognizes the many benefits that various groups, organizations, volunteers and events within the municipality provide by promoting and improving upon the cultural, social and economic well-being of the community.

The Town is committed to treating all requests for donations, grants and sponsorships in a consistent, fair and equitable manner subject to local needs, priorities and Council's approved budget.

### **SCOPE**

This policy applies to all community and charitable organizations serving the Town of Marystown that request a donation, grant or sponsorship from the Town in support of a program, event or service.

### **POLICY STATEMENT**

The Town of Marystown has the responsibility of ensuring that municipal funds and donations, grants and sponsorships granted to registered charities, non-profit organizations and public and private organizations for the purpose of starting, operating, supporting or maintaining community-based programs, events or services are distributed in an open, fair and accountable process and are beneficial to the community.

This policy is designed to assist Council in administering requests for donations/sponsorships, to establish guidelines for requests for donations, grants and sponsorships from the Town.

### **DEFINITIONS**

Clerk – the Clerk appointed by the Town Council of Marystown or his/her designate

Donation – a monetary gift to charitable or non-profit groups or organizations for a particular purpose that provides a direct benefit to the residents of Marystown

Donation in-kind\* – a donation that does not involve a monetary contribution but instead might include providing a promotional item, a Town service/resource, waiver of user/rental fees or other item

\* Municipal resources eligible for a donation in-kind include:

- use of a municipally-owned facility (rental fee waived/reduced)
- use of municipal staff as support for an event (wages waived/reduced)
- use of municipally-owned equipment (rental fee waived/reduced)
- use of municipally-owned materials (rental fee waived/reduced)

Grant - a transfer payment made to an organization from which the Town will not receive any goods or services directly in return

Event - a planned public or social occasion

Program - a system of services, opportunities or projects, usually designed to meet a social need

Service - a contribution to the welfare of others

Sponsorship – an opportunity that will, in most cases, offer a promotional opportunity for the Town. Where Town sponsorship has been approved, groups or organizations must recognize the Town of Marystown by using the Town logo on all advertising and printing.

Town or the Town – Town of Marystown

Town Facilities - Kaetlyn Osmond Arena  
Municipal Centre and Grounds  
Summer Games Building  
Track and Field Complex (including stage area) and Kinsmen Complex

## **RESPONSIBILITIES**

Council is responsible for approving this policy and any amendments and approving donations and sponsorships as per this policy.

The Clerk will support the implementation of this policy and recommend any amendments.

The Director of Finance & Administration will administer this policy to ensure compliance and consistence.

## **REFERENCES**

Organizations seeking a tax exemption are to reference the Permissive Tax Exemption Policy.

Organizations or individuals seeking a donation for sports purposes are to reference the Assistance to Affiliates Policy.

## **QUESTIONS**

The Director of Finance & Administration will act as a resource on donations and sponsorship as it pertains to this policy.

## **PROCEDURE**

The Town will implement and maintain a donation, grant and sponsorship program with the purpose of demonstrating good corporate citizenship. Annually, the Town will budget the exact amount of money it will expend for donations, grants and sponsorships to support various community programs, events and services.

Council may, at their discretion and by a two-third vote of the Councillors in office as per section 99 of the *Municipalities Act, 1999*, approve a request for a donation, grant or sponsorship that meets the criteria set out in this policy.

## **Criteria**

Donations, grants or sponsorships can take the form of cash contributions, merchandise or in-kind contributions.

Donation, grant and sponsorship requests will be evaluated against predetermined criteria and with due regard to the value of the request. Approval for a donation, grant or sponsorship is **not** meant to provide annual operating funds for organizations on an ongoing basis.

The criteria to be met by organizations requesting a donation, grant or sponsorship from the Town is as follows:

- be based within the Town of Marystown or provide a direct benefit to the residents of Marystown
- be a charitable or non-profit organization (heritage organizations must have Municipal and Provincial designation as a heritage site)
- demonstrate fundraising efforts
- demonstrate the significance of the program, event or service
- the total detailed cost of the program, event or service
- the benefit to the community
- not be the recipient of any other financial or other type of assistance from Council
- not be a Federal or Provincial Government funded initiative
- agree to acknowledge Council's contribution in any publicity relating to the program, event or service to which the donation, grant or sponsorship applies

Preference is given to organizations falling within the following categories:

- charitable or non-profit
- can demonstrate community support and involvement
- can demonstrate how the funds or in-kind donations from the Town are to be spent with the expected outcome of the event
- programs, events or services that support, sustain, promote, inform, educate, celebrate, preserve and/or provide access to the arts, culture, environment, heritage, youth, children, elders, recreation and/or healthy living activities

The following are not eligible for support:

- individuals, organizations, projects or activities located outside the Town's municipal boundaries or whose primary focus is not within the municipality
- professional fundraisers working on behalf of an organization
- unsolicited or generic requests that may have been sent to other various organizations
- organizations or charities that normally solicit funds from residents through door-to-door canvass, mail-out solicitation, telemarketing or similar direct-to-resident fundraising
- requests for cash donations
- 'To Whom It May Concern' letters

### **Application Process**

Applications for events must be submitted at least **one month** prior to the event.

Applications for a continuous program or service must be submitted by **November 30<sup>th</sup>** in the year prior in order to be considered during the budget process.

All requests for a donation/sponsorship must be made by application and provide supporting details that the program, event or service is providing an economic or cultural/social benefit to the residents of Marystown.

A charitable or non-profit organization must be sponsoring the program, event or service and an individual representative of this organization must complete the written application.

A detailed budget showing proposed revenues and expenditures for the program, event or service must be submitted with the application. Council reserves the right to request a financial statement from the previous year prepared by a qualified person.

### **Approval Process**

The Director of Finance & Administration shall review each application for completeness. **Incomplete applications will not be considered.**

The Director of Finance & Administration will prepare a summary report of the applications, relative to the eligibility criteria, for the Clerk's recommendation to Council through the Finance Committee.

Donations, grants or sponsorships will be granted by a two-third vote of the Councillors in office as per section 99 of the *Municipalities Act, 1999*.

Donations, grants or sponsorships that have been approved are not to be regarded as a commitment by the Town to continue such donations, grants or sponsorships in future years. The Town reserves the right to limit the number of donations/sponsorships made to a particular organization in any given year. Requests will not be approved retroactively.

Applicants will be advised as to whether their request for a donation, grant or sponsorship was approved or denied with the reasons for the denial.

### **Requests for Donation of Furnishings/Equipment**

With the exception of the use of tables, chairs, podiums, BBQs, projectors, etc., on Town grounds for Town-supported events, requests for the donation of furnishings will not be approved.

### **Requests for Reduction or Elimination of Fees for Use of Town Facilities**

Charitable and non-profit organizations may request a reduction or elimination of fees from the Town for the use of Town facilities. Any reduction or elimination of fees can only be done by motion of Council. This reduction or elimination of fees shall only be

done in exceptional circumstances and will not be granted for licensed events using Town facilities.

### **Pre-Approved Annual Donations/Sponsorships**

Council has traditionally contributed to the following organizations and will continue to contribute, upon written request where necessary, to these organizations. These contributions are to be included in the annual budget allocation and are to be reviewed every three (3) years.

- Dr. Chester Harris Memorial and Mary Hodder Scholarships - \$1,000.00 (\$500.00 each)
- Kaetlyn Osmond Ice Crystals Scholarship - \$1,000.00
- Kin & Friends Radiothon - use of Municipal Centre
- Kinsmen & Kinettes – use of the Summer Games Building for meetings/events (no cost)
- Kinsmen & Kinettes – use of the Kaetlyn Osmond Arena for one day of the year (no cost)
- Kinsmen Manor for Seniors Inc. - \$2,000.00
- Kinsmen Santa Claus Parade - \$500.00
- Lions Club of Marystown - use of the Kaetlyn Osmond Arena for one day of the year (no cost)
- Marystown Central High School Annual Scholarship and Awards Program - \$500.00
- Marystown Volunteer Fire Department - \$900.00 (annual donation in lieu of turkey gift cards - 30 members x \$30.00 each)
- The Salvation Army (Happy Tree) - \$100.00



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Sam Synard  
Mayor



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Dennis Kelly  
Chief Administrative Officer



Is the organization in good standing? If not, please explain.

What is the nature of your organization?

- Registered Charity (provide document) (ie., relief of poverty, advancement of education, advancement of religion or other purpose beneficial to the community)
- Charitable or Non-profit (not registered as a charity) (ie., social welfare, civic improvement, pleasure, recreation or any other purpose except profit)
- Heritage (include designation)
- Other \_\_\_\_\_

Does the organization engage volunteers? If so, in what way?

Briefly describe the principle objective of the organization and the benefit to the residents of Marystown.

**FINANCIAL INFORMATION**

Request is for       Program               Event               Service

Type of Request     Donation             Grant               Sponsorship

Is this a monetary request? If so, what is the amount requested?    \$ \_\_\_\_\_



If requesting a donation in-kind, what is the organization requesting? (tick all that apply)

- use of municipally-owned facility
- use of municipal staff as support for an event (wages waived/reduced)
- use of municipally-owned equipment (rental fee waived/reduced)
- use of municipally-owned materials (rental fee waived/reduced)

Provide details regarding the donation in-kind (ie., request for municipal facility, number of municipal staff, etc.).

Overall budget for the program, event or service    \$ \_\_\_\_\_  
(attach detailed budget)

Provide the amount of funds the organization is committing or raising towards the program, event or service it is sponsoring.

\$ \_\_\_\_\_

Briefly describe the program, event or service and its importance to the residents of Marystown.

Briefly describe how a donation, grant or sponsorship from the Town will be expended.

Does the organization conduct fundraising activities? If so, list these activities.

Does the organization receive any other source of funding? If so, list the sources and amounts.

**CHECKLIST OF ATTACHMENTS (must accompany application, if applicable)**

- Charity Registration documents       Board of Directors (if not listed on application)
- Heritage Designation documents       Detailed budget for the program, event or service

**ACCESS TO INFORMATION AND PROTECTION OF PRIVACY ACT, 2015**

The Town of Marystown is subject to the provisions of the *Access to Information and Protection of Privacy Act, 2015*. While the Town only uses information for the purpose it was collected, the Town cannot guarantee that all information provided to the Town can be held in confidence.

**APPLICANT'S DECLARATION**

I declare that I have authority to make this application on behalf of the noted organization. I confirm that the information contained in this application and accompanying documents is true, accurate and complete. I agree to provide any other information that may be requested, including financial information, that is in addition to what is required as per this application. I understand that any misrepresentation or material omission on this application can result in the application being declined.

Name \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_