

# Municipal District of Opportunity No. 17

## FINANCE POLICY

**TITLE:** ANNUAL GRANTS TO OTHER ORGANIZATIONS POLICY

**EFFECTIVE DATE:** February 24, 2025

**POLICY NUMBER:** F. 18

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### **I. PURPOSE:**

The Municipal District of Opportunity No. 17 (the "MD") wishes to provide grants to Organizations of the MD to improve their support activities that support the community.

The Policy outlines the grants available and the criteria. All grant applications will be assessed based on the Policy to ensure equitable, accountable and effective use of grants to further the purpose of the Policy.

The Policy applies to all grants but specific grants may have additional application and eligibility requirements. Each grant must be used for the purpose specified and some grants may have additional conditions or reporting requirements that must be met to obtain and retain the grant.

### **II. APPLICATION:**

The Policy applies to grants being provided to Organizations on an annual basis, as part of the budgeting process. This includes grants to Organizations such as schools, community groups and societies, and any other grant recipients that are provided grant funding on an annual basis through the budget.

### **III. DEFINITIONS:**

1. **Activity Report** means a written report detailing use of grant money including what took place, how the grant was spent, and what benefits were gained by the community, individual or group.
2. **Applicant** means the Organization or Individual representing the Organization that applies for a grant.
3. **Council** means the council of the Municipal District of Opportunity No 17.
4. **Deadline** means September 30 of the year of application, for review and potential funding of grant for the following calendar year.

5. **Financial Report** means a statement of an organization's current financial condition, including an Income Statement & Balance Sheet certified by at least two Board members, and includes any additional information requested by MD.
6. **Individual** means an individual who is affiliated with an Organization.
7. **MD** means the Municipal District of Opportunity No 17.
8. **Organization** means a registered not-for-profit organization in good standing with corporate Registries such as a society or company.
9. **Owner** means a person registered under the *Land Titles Act* as owner or part owner of land.

#### IV. APPLICATIONS - GENERAL

1. All Applicants must submit a complete and legible application package, which includes an application form and any other information required to the MD to review the application, by the application deadline. Specific grants may have additional application requirements.
2. Application forms must be complete and signed by the Applicant.
3. Applications may require additional presentations and discussions, depending on the value, purpose, or other conditions of the grant, at the sole discretion of the MD. If this is required, Administration will schedule a meeting between MD Council, Administration & the applicant to review additional information as required. The additional information required will be detailed by Administration prior to the meeting, to provide opportunity for the applicant to prepare required information.
4. Applicants who are Organizations must include a report from Corporate Registries evidencing the Organization is in good standing, unless the Organization is exempted from this requirement due to the nature of the Organization not requiring registration, at the discretion of the MD.
5. Applicants may provide proof of Permanent Residency by providing municipal utility bills or provincial or federal documentation showing the Applicant's address if required.
6. Applicants are eligible for one grant per calendar year. Applications for additional funding not included in the original application may be considered at the discretion of the MD in exceptional circumstances, subject to budget availability.
7. Applications must be received by September 30 of each year to be included in budget deliberations for the following calendar year. This will be considered the deadline for grant applications.
8. Applications from Organizations who failed to meet the conditions or reporting requirements of a previous grant, misrepresented information in a previous application or used previous grant funds in a manner contrary to the intention of the grant may, at the discretion of the MD, not be considered for future grants.

9. Applicants who are not in good standing with the MD on the application deadline date, including owing a debt to the MD or being engaged in active litigation or enforcement with the MD, are not be eligible for a grant.
10. Applicants who are eligible to receive provincial or federal funding must first apply for provincial and federal funding before applying for a grant from the MD for the same purpose. If an Applicant is found negligent if applying for provincial or federal funding, Administration will cancel the grant from the MD and demand repayment of any expended grant funds.

## **V. REVIEW OF APPLICATIONS**

1. All applications will be reviewed for completeness and policy alignment by Administration prior to inclusion in budget deliberations.
2. Incomplete or illegible application packages will be returned to the applicant to revise and resubmit accordingly. The revisions must be submitted by the deadline for applications.
3. Late applications may be considered at the discretion of the MD in exceptional circumstances and subject to budget availability.
4. Applications that include incorrect or inaccurate information or misrepresent information, or are subsequently found to include incorrect or inaccurate information or misrepresent information will not be considered.
5. If Administration determines Family and Community Support Services (FCSS) funding is available for the application, Administration will redirect the application to FCSS for review.
6. After budget deliberations, Administration will advise the Applicant, in writing, if the application is successful and outline the conditions or reporting requirements.
7. All application decisions are final.

## **VI. USE OF GRANTS**

1. Grants may only be used for the purpose for which the grant is given in accordance with the conditions of the grant.
2. Grants are not transferrable.
3. If a grant is not fully spent within the calendar year the funds are applicable to, the Applicant must refund the remaining funds to the MD unless otherwise approved by the MD to hold funds due to uncontrollable issues or delays, at the MD's sole discretion.
4. If Administration exercises their discretion to provide a grant in advance of costs being incurred, relevant information and documents required as part of the application package

may be deferred, as conditions or reporting requirements of the grant, to be provided when the work eligible for the grant is complete.

## **VII. GRANT REPORTING**

1. Applicants who receive a grant must provide, within 90 days of the following calendar year, the following based on the grant awarded:
  - a. For grants up to \$10,000 – an Activity Report, detailing the use of the grant funding;
  - b. For grants of \$10,001 to \$100,000 – an Activity Report, detailing the use of the grant funding and a Financial Report;
  - c. For grants greater than \$100,001– an Activity Report, detailing the use of the grant funding, a Financial Report and compiled financial statements that have been examined by a Chartered Professional Accountant and include a signed Notice to Reader.

## GRANT APPLICATION FORM

Applications must be complete, legible, signed and dated. This form must be included with all applications. Applicants should review both the general and specific application requirements set out in the Policy. Incomplete or illegible application packages will be returned for revision. Applications should be submitted in advance of the application deadline. Applicants are responsible for ensuring all contact information is up-to-date.

1. Full name of Applicant  
(Organization Name):

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2. For the Organization, name  
and position of authorized  
representative:

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3. Phone Number:

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4. Street Address:

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5. PO Box

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6. Hamlet/Community:

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7. Postal Code:

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8. Email Address:

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9. Amount of Grant being  
applied for:

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*I certify that this application is correct, accurate and contains no misrepresentations.*

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Printed Name of Applicant or  
Representative

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Signature

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Date of Application