



## Municipality of Grand Lake (MOGL) Donation and Swag Policy Policy No. MOGL - 09

### 1. Purpose

The purpose of this policy is to provide clear, transparent, and consistent guidance to Council, staff, community organizations, and residents regarding requests for donations, grants, SWAG (promotional items), and in-kind support from the Municipality of Grand Lake (MOGL). This policy ensures accountability, fairness, alignment with municipal priorities, and compliance with budgetary and legislative requirements.

### 2. Scope

Council recognizes the valuable role that community organizations, volunteers, and charitable initiatives play in enhancing quality of life within the Municipality of Grand Lake. While MOGL endeavours to support community initiatives wherever feasible, all requests are subject to available funding, established procedures and Council approval.

### 3. Definitions

For the purposes of this policy:

- **Community Organization:** A recognized non-profit, not-for-profit organization, or registered charity that serves residents of the Municipality of Grand Lake.
- **Community Group:** A non-profit group of individuals with a specific mandate focused on community, recreation, culture, or education.
- **Discretionary Fund:** A portion of the annual municipal budget allocated to individual Councillors to support eligible community organizations or initiatives through either a monetary donation or the provision of SWAG, in accordance with the Municipality of Grand Lake's Donation and SWAG Policy.
- **Donation:** A voluntary, non-reciprocal contribution of municipal funds, SWAG, or in-kind support provided by the Municipality of Grand Lake to an eligible non-profit, not-for-profit organization, registered charity, or community group for a defined community benefit, where no goods, services, advertising, or other consideration are received by the Municipality in return.
- **Management:** A member of municipal staff with administrative authority, including the Clerk, Treasurer, Superintendent, or Recreation Manager.
- **Municipal Infrastructure:** Any municipal-owned facility, building, park, or equipment.
- **Staff:** *Staff* refers to **administrative staff** employed by the Municipality of Grand Lake who have responsibilities for policy administration, financial processing, program support, or operational oversight.

- **SWAG:** Promotional or goodwill items (e.g., branded merchandise or small-value support) provided by the Municipality.

Note: Words written in the singular include the plural and vice versa.

#### **4. General Principles**

- MOGL will normally provide financial or in-kind support only to non-profit, not-for-profit organizations, and registered charities.
- All organizations requesting funding or support must provide proof of their organizational status prior to the request being considered.
- For-profit businesses will not normally receive monetary donations; however, exceptions may be made at the discretion of Council.
- All requests must align with MOGL’s ethics, values, and strategic priorities and approved budget.

#### **5. Budget Allocation**

- Donations, grants, and SWAG funding shall be assessed annually through the municipal budget process.
- Beginning with the 2026 budget year, Council has established a guideline of \$1,000 per Councillor as the total donation allocation for the Municipality of Grand Lake.
- All funding decisions remain subject to Council approval and overall fiscal capacity.

#### **6. Donation and Grant Application Process**

##### **6.1 Public Access & Submission Requirements**

- MOGL shall maintain a “Donations” page on its website outlining eligibility, requirements, timelines, and procedures.
- Requests for monetary donations or grants must be submitted using the approved application form, which may be provided online to streamline intake.
- All applications must clearly indicate:
  - Amount requested
  - Purpose of the request
  - Intended payment date (if approved)

## 6.2 Submission Deadline

- All requests must be received by **October 15** for consideration in the following calendar year (beginning January 1).

## 7. Intake, Review, & Approval Process

To ensure clarity and accountability, the following process applies:

### Step 1 – Intake (Clerk)

- All requests are submitted to the Clerk’s Office.
- The Clerk will:
  - Confirm completeness of the application
  - Log requests into a donation tracking register (date received, applicant, amount requested, category, recommended payment date)
  - Save all documentation to SharePoint
  - Liase with applicable management personnel regarding applications pertaining to their area of expertise

**Note:** A recommendation will only be recorded in the tracking register, subject to budget approval.

### Step 2 – Financial Review and Prioritization (Finance)

- On or around **October 15**, Finance will review all recommended requests collectively to:
  - Confirm affordability within the proposed budget
  - Prepare a prioritized summary for Council’s budget deliberations

### Step 3 – Budget Approval (Council)

- At the **first regular Council meeting in November**, Council will:
  - Approve the total donation envelope
  - Approve, amend, or deny recommended requests

**Note:** Where funding overlaps with recreation or programming, approved funds will flow through the Recreation Manager’s budget and authority.

## 8. Funding Thresholds & Documentation

- **Requests of \$1500 or less:**
  - **Application** required
- **Requests of \$1,500 or more** must also include:
  - Most recent financial statements
  - Detailed explanation of the request
  - Description of how funds will be used

Note: Incomplete applications will not be considered.

## 9. Eligibility Criteria

Requests will be evaluated based on:

- Service to residents of the Municipality of Grand Lake
- Demonstrated community benefit
- Alignment with municipal priorities
- Avoidance of duplication with existing municipal programs

## 10. Councillor Discretionary Budgets

- Councillors may provide funding or SWAG through their discretionary budgets, provided requests align with this policy.
- Councillors must confirm budget availability with the Treasurer prior to committing funds.

## 11. Swag Policy

- Council shall annually approve a SWAG budget.
- Staff, with approval from the Clerk, may authorize SWAG donations up to a value of \$75 per request. Once the cumulative value of staff-approved SWAG donations reaches \$1,500 within the approved budget year, any further SWAG donations must be submitted to Council for approval.
- Any SWAG requests exceeding \$75 requires Council approval.

## 12. Use of Municipal Infrastructure (Donated or No Cost)

- Donation or no-cost use of municipal infrastructure will be approved only for:
  - Non-profit, not-for-profit organizations, registered charities, or individuals;
  - Initiatives that provide free programs or services to residents of Grand Lake.
- All other users shall be charged the prevailing rental rate and required security deposit.
- Staff must ensure:
  - Organizational status is verified;
  - Applicable fees and deposits are collected prior to authorizing facility use

## 13. Fundraising and Special Circumstances

MOGL recognizes that various groups and individuals may fundraise in support of municipal initiatives or residents in need. Where clarification is required regarding eligibility or appropriateness, Council shall make the final determination.

## 14. Administration and Authority

- This policy shall be administered by the Clerk's Office.
- Council retains final authority over all donations, grants, SWAG allocations, and exceptions under this policy.

NOTE: This is a **CONTROLLED** document. Any reference should **ALWAYS** be compared/checked against the electronic version on the website.

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