
Reporting Requirements for Anchored Organizations

Purpose

As part of Council's review in 2011 of financial support programs available to City of Oshawa organizations and events, nine events/organizations were deemed to be 'anchored events/organizations' ("Anchored Organizations"). Council completed a subsequent review in 2012 to designate an additional event deemed as an Anchored Organization.

By recognizing these groups/events as Anchored Organizations, Council has demonstrated their commitment to working with Oshawa-based, not-for-profit volunteer community organizations that have provided beneficial programs and services to the community over the past several years. This program ensures these organizations are provided with a consistent funding source, subject to regular review by Council, as part of the City of Oshawa's annual budget submission. Many of the programs and services offered by these groups often supplement programs beyond the City's capability and are considered economic drivers or long-standing and events.

To continue to be considered an Anchored Organization the specific criteria and reporting requirements outlined in this policy must be met.

Organizations Who Are Eligible

This policy only applies to the following Anchored Organizations approved by Council in reports FA-11-164 and Corp-12-220. Any other group needs to review the policy titled "Partnership Grant Program".

Anchor Organizations:

- Boys and Girls Club of Durham
- Downtown Board of Management – Autofest Kick-off
- Friends of Second Marsh
- Motor City Car Club – Autofest
- Ontario Philharmonic
- Oshawa Folk Arts Council - Fiesta Parade
- Oshawa Métis Council - Métis Festival
- Oshawa Rotary Club - Oshawa Ribfest
- Santa Parade of Lights
- Sports Hall of Fame

Level of Annual Funding for Anchored Organizations

A cash contribution and/or in-kind service value equal to the approved 2011 budget allocation will be included in the City's annual budget submission. Council may at any time reconsider the funding allocations listed below and will reevaluate continued entitlement of funding to Anchored Organizations in the second year of each term of Council at a minimum.

Any expenses incurred which exceed the annual amount approved by Council will be the responsibility of the Anchored Organization and will be invoiced by the City.

Anchored Organizations are not eligible to apply for funding under any other City program.

Anchored Organization	2011 Approved Grant \$	2011 Approved In-kind \$	2011 Approved Total \$
Boys and Girls Club of Durham	55,000	0.00	55,000
Friends of the Second Marsh	40,000	0.00	40,000
Motor City Car Club – Autofest	0.00	25,500	25,500
Ontario Philharmonic	28,000	0.00	28,000
Oshawa Folk Arts Council - Fiesta Parade	5,000	15,000	20,000
Oshawa Métis Festival - Métis Festival	0.00	5,100	5,100
Oshawa Rotary Club - Oshawa Ribfest	0.00	31,800	31,800
Santa Parade of Lights	5,000	0.00	5,000
Sports Hall of Fame	20,000	0.00	20,000

Anchored Organization	2012 Approved Grant \$	2012 Approved In-kind \$	2012 Approved Total \$
Downtown Board of Management – Autofest Kick-off Event	0.00	11,500	11,500

Reporting Requirements:

The Anchored Grant Reporting Form is available from Finance Services at 905-436-3311 ext. 2165.

The deadline for the Anchored Grant Reporting Form is October 1.

Completed forms with supporting documentation are to be sent to budgets@oshawa.ca or:

City of Oshawa
 Attention: Finance Services
 50 Centre St. S.
 Oshawa, ON
 L1H 3Z7

The form requires Anchored Organizations to provide:

- a description of what the grant will be used for;
- a summary of prior year's accomplishments;
- a summary of the services provided and/or event results; and
- specific financial information related to the organization such as a budget for the upcoming year, year-to-date financial statement, accumulated surplus information and most recent audited financial statements (unaudited where audited are not available).

Anchored Organizations are required to meet with City staff to review and assess opportunities that will help them achieve greater sustainability and reduce their reliance on City support.

Use of Funding

Grants are provided to Anchored Organizations to assist with the general operating and capital expenses of the organization, including administrative costs and program-related expenses.

Annual Grants are not to be used:

- to support programs or services geared specifically to ratepayer coalitions or tenant/landlord associations;
- to support programs or services which are political in nature;
- for donations to charitable causes; and
- for debt retirement expenditures.

Payment of Approved Grant Amount

All reporting requirements must be satisfied and Council must approve the City's budget before payment of annual cash grant to Anchored Organizations.

Anchored Organizations will receive a cheque based on their annual grant amount (cash portion only, not applicable to in-kind services) approximately one month following the passing of the Budget, unless other specific conditions are recommended and approved by Council.

In-kind Services

Anchored Organizations with in-kind service needs must contact the Event and Community Engagement Supervisor to ensure that the event can take place as planned and that all anticipated in-kind services have been discussed. In-kind services include all items listed in the General Fees and Charges by-law (park/facility rentals, permit fees, license fees and utility fees) as well as costs associated with staff overtime, benefits, and out of pocket expenses. The City will not cover costs incurred with external agencies (police services). Any expenses which exceed the annual in-kind grant amount approved by Council will be the responsibility of the Anchored Organization and will be invoiced by the City.

Recognition

To maintain the highest standards of public accountability and to ensure transparency regarding the distribution of public funds, the following recognition program must be complied with.

- Certificates, provided by the City, acknowledging the City's support must be displayed in an appropriate high-traffic location.
- Acknowledge the City's support in public announcements, media releases and websites and at special events.
- Annual reports, newsletters, event programs and exhibits must include the appropriate recognition.

The following table illustrates the recognition program.

Value of Funding Provided	Display of Certificate	Website	Display City Logo at Event*	Event Programs	Annual Report	Newsletters and Publications	Media Release/Conference
Under \$500	X						
\$500 - \$2,000	X	X		X	X	X	
\$2,001 - \$5,000	X	X	X	X	X	X	
Over \$5,000	X	X	X	X	X	X	X

* The City of Oshawa Logo is a registered trademark of the Corporation of the City of Oshawa. Any reproduction of the Logo without the City of Oshawa's expressed permission is prohibited.

Parties seeking permission to use the City of Oshawa Logo must complete the Application to use the City of Oshawa Logo on the Corporate Communications webpage:

<http://www.oshawa.ca/Communications>

Completed applications are to be submitted to communications@oshawa.ca, or by fax at 905-436-5623 or by mail to:

City of Oshawa
 Attention: Corporate Communications
 50 Centre St. S.
 Oshawa, ON
 L1H 3Z7

Corporate Communications will review and provide feedback/approval within five business days upon receipt of the completed Application.