

# Sponsorship Comparison - 2004 - 2006

## 2004

### Re-occurring Sponsorships (events sponsored in all 3 years: 2004, 2005, 2006)

Dragon Ball	\$3,040
Evergreen Hospice - Table of 10	\$1,400
Evergreen Hospice Sponsorship	\$1,000
Markham Stouffville Hospital - 2004 Gala Dinner	\$3,000
Richmond Hill & Markham Chinese Bus. Assoc. Gala	\$1,380
Kidney Ruby Gala	\$3,000
Sports for Kids Ball	\$2,000
York Regional Police - Corporate Table of 8	\$1,200
York Central Hospital Casa Blanca event*	\$3,000
Markham's Gala Evening (Nov. 5)	\$1,000

\$20,020

## 2005

Yee Hong Dragon Ball	\$2,400
Evergreen Hospice Gala - Winter Frolic	\$980
Markham Stouffville Hospital Gala - "Midnight at the Oasis"	\$3,500
Richmond Hill and Markham Chinese Business Assoc. Gala	\$1,380
Kidney Foundation Gala	\$750
Sports for Kids Ball 2005 - Table of 10	\$2,000
Police Appreciation Night - 13th Annual	\$450
York Central Hospital Gala - The Beat Goes On	\$3,000
Markham Foundation Gala - Silver Sponsorship	\$2,000

\$16,460

## 2006

Yee Hong Dragon Ball	\$2,000
Evergreen Hospice Gala - Winter Frolic	\$2,100
Markham Stouffville Hospital Gala - "The Kit Kat Club"	\$3,500
Richmond Hill & Markham Chinese Business Association Gala	\$900
Kidney Foundation - "Art of Giving" Gala	\$2,750
Sports for Kids - 7th Annual Gala	\$2,000
York Regional Police Appreciation Night - Table of 8	\$1,200
York Central Hospital Foundation Gala Dinner	\$3,000
Markham Foundation Gala	\$2,000

\$19,450

### Sponsorships that occurred in 1 out of the past 3 years

Unionville Home Society - "The Brick Party"	\$1,200
Hospice Thornhill - Table of 10	\$750
Herbert H. Carnegie Ball	\$360
Lilac Gala - Corporate Table of 10	\$750
Unionville Home Society - Platinum Sponsorship*	\$5,000

\$8,060

Markham Stouffville Hospital - Legacy Run	\$500
Ontario SPCA York Region Golf	\$1,400
Centre Stage Gala	\$1,000
Taste of Asia - Table of 10	\$500
Markham Prayer Breakfast	\$600
Toronto Chinese Community Services Association	\$772

\$4,772

Mayor's Dinner for the Arts - "Pursuing Dreams"	\$2,050
Filipino Disaster Relief Fundraising Gala	\$2,500
Markham Board of Trade Gala	\$2,000
Seneca Alumni 2006 Invitational	\$2,500
Don Cousens Tribute Dinner	\$2,000

\$11,050

### Sponsorships that occurred in 2 out of the past 3 years

Pakistan National Day Corp. Table	\$3,000
In Celebration of Women - Awards	\$850
YMCA (A. Chiu Charities)	\$3,000
York Reg. Police - Pipes & Drums Gala	\$450
Future Possibilities Sponsorship	\$1,000
"If I Had A Million Dollars" (Stephen Lewis) Gala Dinner	\$1,500

\$9,800

Pakistan National Day - Gold Sponsorship	\$3,000
York Regional Police Pipes & Drums - 4th Annual Tartan Gala	\$600
Markham YMCA Table	\$200
In Celebration of Women's Awards	\$1,000

\$4,800

### Total Funded

\$37,880

\$3,250

\$33,750

\* As approved by Council, these projects were funded from the Corporate Contingency Account

APPENDIX 1



## GENERAL COMMITTEE

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**TO:** Mayor and Members of Council

**FROM:** Andy Taylor, Commissioner of Corporate Services  
Barb Cribbett, Treasurer

**PREPARED BY:** Mark Visser, Manager of Strategy, Innovation & Investments

**DATE OF MEETING:** 2005-May-30

**SUBJECT:** Grants & Sponsorships Guidelines

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### RECOMMENDATION:

THAT the report dated May 30, 2005 entitled "Grants & Sponsorships Guidelines" be received;

AND THAT the attached Grants & Sponsorships Guidelines be approved;

AND THAT all funding requests that do not fall into the Celebrate Markham and Table Sponsorships categories be grouped into a generic "Council Promotion" category with an upset limit of \$1,000 per request, unless otherwise approved by Council.

### PURPOSE:

The Council of the Town of Markham recognizes the contribution of community groups/organizations in their attempt to enhance and promote the Town, and is committed to building the community by celebrating the artistic and cultural uniqueness of Markham.

While the Town would like to assist in every worthwhile cause brought forward, there are financial restrictions caused by competing interests vying for a limited pool of funds. Each year, numerous requests are brought forth to Council and individual members of Council from organizations and groups seeking Town funding (both reoccurring and one-time events).

As the Town strives to continually be a financially and socially responsible organization, the following guidelines have been developed to help assist Council to determine which endeavours provide a value and benefit to the Town, and the appropriate funding limits associated with different types of requests.

**BACKGROUND:**

There are currently six categories of funding available:

<b>Category</b>	<b>2005 Budget</b>	<b>Individual Limits</b>	<b>Approval Method</b>
Celebrate Markham	\$207,500	n/a	Budget Process
Table Sponsorship	\$22,000	\$3,000	Ad Hoc
Travelling Teams	\$3,000	\$1,000	Ad Hoc
Council Promotion – Minor	\$4,000	\$250	Ad Hoc
Council Promotion – Major	\$5,000	\$1,000	Ad Hoc
Major Temporary Support	\$0	\$1,000	Ad Hoc
<b>Total</b>	<b>\$241,500</b>		

Currently, Celebrate Markham events are approved through the budget process, while all other funding decisions are made throughout the year. The total funding available and individual limits are reasonable and no changes are recommended. However, the current method in which requests are handled and the guidelines associated with the approval process make it difficult to stay within budget. Furthermore, the large number of grant/sponsorship categories makes approval and payments difficult to track on a consistent basis.

It is recommended that all grant and sponsorship requests that do not fall into the Celebrate Markham or Table Sponsorship categories be grouped into a generic “Council Promotion” category with an upset limit of \$1,000 per request, unless otherwise approved by Council.

It is recommended that the budget amounts for each individual category be approved during the budget process, with the detailed allocations to be decided upon by the following areas:

- Celebrate Markham – Grants Sub-Committee
- Table Sponsorships – Mayor’s Office
- Council Promotion – Clerk’s (or Council if over \$1,000)

The proposed methodology is as follows:

<b>Category</b>	<b>2005 Budget</b>	<b>Individual Limits</b>	<b>Allocation Method</b>
Celebrate Markham	\$207,500	n/a	Grants Sub-Committee
Table Sponsorship	\$22,000	\$3,000	Mayor’s Office (or Council if not on list)
Council Promotion	\$12,000	\$1,000 (Advertising @ \$250)	Clerk’s (or Council if over \$1,000)
<b>Total</b>	<b>\$241,500</b>		

**ATTACHMENTS:**

Appendix “A” - Town of Markham Grants and Sponsorship Guidelines

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Barb Cribbett, Treasurer

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Andy Taylor, Commissioner, Corporate Services

Appendix "A"  
Town of Markham  
**Grants and Sponsorships Guidelines**

**GRANTS & SPONSORSHIPS GUIDELINES:**

The Grants/Sponsorships Guidelines are broken down into three categories: Celebrate Markham, Table Sponsorships, and Council Promotion.

**Celebrate Markham**

The Celebrate Markham category consists of not-for-profit festivals/events that promote and recognize Markham as a great place to work, live and play.

In the past, the following events fall within the "Celebrate Markham" category:

- Black History Month
- Canada Day Celebrations
- Character Community
- Chinese New Year Celebration
- Doors Open Markham
- Markham Arts Council
- Markham Festival
- Markham Jazz Festival
- Markham Rotary Club Santa Claus Parade
- Milliken Mills Children's Festival
- Senior Citizen's Light Tour
- Senior's Extravaganza
- Senior's Hall of Fame
- Taste of Asia
- Thornhill Festival
- Unionville Festival
- Volunteer Appreciation Event

The level of funding for the entire Celebrate Markham category of events will be set during the Business Planning/Budgeting process. Funding amounts for individual Celebrate Markham events are to be set through the recommendations of the Grants Sub-Committee each year. The Grants Sub-Committee will meet after the Budget is approved by Council to determine these allocations. For the few Celebrate Markham events that occur early in the year (Black History Month, Chinese New Year), the funding levels are to be determined during the Budget process.

Before final funding is authorized, the following information for each event should be submitted to the Town prior to the date of the event:

1. budget for the event (including details of what the Town funding will be spent on)
2. previous year's financial statements
3. details of how the most recent event was received and a proposal for the upcoming year (including how the Town was represented)

For each of the Celebrate Markham events that the Town contributes money towards, there must be acknowledgement of the Town grant on all promotional material. At the event itself, Town signage must be present (to be provided by the Town).

Staff will handle the administration of all Celebrate Markham events. Any additional requests for funding over the prescribed budgeted levels will require Council approval.

### **Table Sponsorships & Council Promotion**

While a single organization can submit multiple requests, the maximum funding in any one year cannot exceed \$4,000.

A Grant/Sponsorship made by the Town does not automatically translate into implied funding in subsequent years.

If overspending occurs in any category, the Town's Expenditure Control Policy will take effect.

### **Table Sponsorship**

Table Sponsorships are classified as fundraising galas/dinners/receptions that promote or celebrate positive aspects of the Markham community. As the Town sponsors many of the same events every year, it is recommended that a list of tables be approved during the Budget process.

Table Sponsorships have an upset limit of \$3,000 per organization. During the Budget process, the list of Table Sponsorship events supported in the current year will be submitted for approval for the following year. However, inclusion in the budget does not automatically translate into a sponsorship guarantee. An appropriate number of councillors/senior staff must be able to attend the event before funding is given final approval. If the appropriate attendance cannot be met, the Town can elect not to follow through with the sponsorship. As a result, the administration of Table Sponsorships should continue reside in the Mayor's Office.

Requests not on the approved Budget list may be accommodated during the year assuming there are sufficient funds available within the annual budget envelope. A report will be presented to Council for each of these events.

### **Eligibility Requirements for Table Sponsorships**

- The entity requesting the funding must declare their not-for-profit status
- The funding must be used to serve a social/health, recreational, cultural or economic benefit to the community
- The benefits of the program and/or special event must accrue to Town residents or business community
- Funding will not be provided to any political party/event

### **Council Promotion**

This category encompasses all other requests for grant funding such as Travelling Teams, Advertising and Major Temporary Support. Funding is to be capped at \$1,000 per request (with the exception of Advertising at a maximum of \$250) and will be administered through the Clerk's department. Staff will approve and monitor all requests that meet guidelines and are within the approved budget envelope and individual funding limits. Staff will prepare status reports to Committee on all requests received and approved. Any request over \$1,000 is to be approved by Council.

The following additional guidelines apply to these distinct areas:

Events - Grant requests sponsored or supported by a Member of Council, or senior Town staff, that do not fall into the Celebrate Markham category. A Member of Council is to be involved with the event.

Travelling Teams - Community Groups/teams/athletes competing at a national or international level and the support is capped at a maximum of 50% of the cost of the wearing apparel to a maximum amount of \$1,000. Funding is restricted to individuals residing in Markham or organizations that have a minimum 75% membership from Markham.

Advertising - Requests for Financial assistance toward the cost of advertising in a community newspaper, yearbook, event program and miscellaneous funding. The advertisement must identify that it is from the Mayor and Members of Council. Funding for this category is to be capped at \$250 per request.

Major Temporary Support - items with extraordinary justification, bridge financing or other unforeseen circumstances. There should be no budget allocation for Major Temporary Support and any funding would have to come from any operating surplus or reserves.

#### Council Promotion/Grants Eligibility Requirements

- The entity requesting the funding must declare their not-for-profit status
- The entity's programs must address a community need or provide a direct benefit to the Town (not applicable to Travelling Teams and Advertising)
- The funding must be used to serve a social/health, recreational, cultural or economic benefit to the community (not applicable to Travelling Teams and Advertising)
- The benefits of the program and/or special event must accrue to Town residents or business community (not applicable to Travelling Teams and Advertising)
- Funding will not be provided for:
  - groups/organizations/events that are primarily of a religious nature
  - any organization outside the Town of Markham (including national or similar organizations) unless that organization can demonstrate a direct benefit to the Town
  - groups which are part of a national or similar organization unless the grant funds will be utilized within the Community
  - services that fall within the criteria of United Way funding
  - issues that fall within the domain of existing Federal, Provincial, and Regional funding (i.e. education, social services, international aid)
  - any political party/event

Council Promotion/Grants Submission RequirementsBefore Approval:

- each organization requesting financial assistance must apply in writing to the Clerk's department
- The organization must have an identifiable and accountable system of controls and lines of authority
- The organization must submit a budget and previous year's financial statements
- The group/organization must have a clearly defined set of goals and objectives for the program/activity and should specify how they will be achieved
- The organization should be able to identify the "outcomes" or the impact to service users and/or the community of the proposed program/activity and demonstrate how proposed outcomes are consistent with the Town's goals and priorities
- The organization must have a demonstrative system to monitor and review actual results to see if they are in compliance with the goals and objectives identified in the application
- The organization must demonstrate the ability and determination that it has explored other sources of financial support from the private sector, other funders, and other levels of government
- The organization must notify the Town of any conflict of interest situations or other contentious situations that may require the organization to seek legal counsel or may be the subject of media attention

After Approval:

- All groups or organizations receiving a Town grant must acknowledge the funding on all promotional material. If an event is scheduled, Town signage must be present (to be provided by the Town)
- The organization should be prepared to submit a brief report identifying how the program/activity met its goals and objectives and to provide a financial accounting of funding
- The organization shall make available for audit by the Town in a reasonable time, the organization's books of accounts and supporting documentation for at least three years to show the receipt and disbursement of funds
- The organization should be available for an on-site meeting during the funding year, if requested
- The organization must not dispose of any surplus Town funds without prior approval of the Town, nor direct funding towards other programs
- The organization must return to the Town any funds as a direct result of the termination of all or part of the program/activity for which Town funding has been awarded