

**TOWN OF LAKESHORE  
FINANCE SERVICES  
FINANCE**

**TO:** Mayor and Members of Council  
**FROM:** Rosanna Pellerito, Director of Finance  
**DATE:** October 11, 2019  
**SUBJECT:** Community Benefit Fund Grant Program

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**RECOMMENDATION:**

It is recommended that Council:

1. Adopt the revised Grant Request Policy AD-069; and
2. Adopt the Lakeshore Community Benefit Fund (LCBF) Grant Policy and related appendices; and
3. Approve a base budget of \$25,500 to be established as part of the 2020 Budget to fund grant requests under this policy.

**BACKGROUND:**

At its meeting on August 13, 2019 Council directed Administration to prepare draft revisions to the current Grant Request Policy AD-069 and prepare a Community Partnership program policy for Council's Review.

Attached is the revised Grant Request Policy AD-069 and a draft Community Benefit Fund Grant policy for Council's review. Also included is Appendix A – Application for Funding under the Lakeshore Community Benefit Fund and Appendix B – Evaluation Matrix.

**COMMENTS:**

Under the proposed policy, only those organizations located in the Town of Lakeshore or provide evidence of a project specific to the Town of Lakeshore, with the majority of participants being from the Town of Lakeshore that meet all of the following criteria will be considered for a grant under the LCBF

- a) Registered charitable organization; or
- b) Registered not-for-profit organization; or
- c) Association or society otherwise recognized at law that is non-for-profit

All organizations requesting funding under the Lakeshore Community Benefit Fund must submit an application using the "Application for Funding under the Lakeshore

Community Benefit Fund". Grants may award by way of cash, in kind assistance or waiver of fees. The Lakeshore Community Benefit Fund is meant for one time funding of projects or initiatives and not an annual allocation. Organizations submitting grant requests for annual re-occurring grant funding will be referred to the Grants Policy AD-0069.

This policy excludes Town support offered through formal partnership and sponsorship agreements and those grants funded through the Grant Fund Policy AD-0069.

This program does not cover the waiving of fees relating to development charges, building permit or planning fees. Council may consider exempting fees for Development Charges through the Development Charges Study. Council may consider waiving or reducing building permit or land use planning fees through an approved Community Improvement Plan.

Applications must provide services that fall into one of the following categories;

**Social & Community Services:** services that respond to the basic needs and safety of residents within the community, including referral, information and assistance in a variety of areas such as health care, food, clothing, shelter, government services, counseling, employment, etc. and services which promote healthy communities.

**Senior or Youth:** Programs or activities directed towards the youth or senior population.

**Historical, Arts & Cultural Events or Organizations:** Events and activities which serve to celebrate history, arts and culture, or gather, document, preserve or otherwise maintain information and artifacts of an historical or cultural value.

**Fundraisers for Municipal Projects:** Fees may be waived for fundraisers held in a municipal facility, whose sole purpose is to raise funds for a municipal project to construct, rehabilitate or maintain municipal infrastructure. Assistance provided in this category will be prorated based on the proportion of funds raised and directed towards municipal projects to total funds raised.

**Community Beautification & Protection/Preservation of the Environment:** includes projects which serve to enhance or beautify the municipality or preserve and protect the environment.

Applications will only be considered on an annual basis with the deadline for submitting an application being September 30<sup>th</sup> for approval in the following year's budget. The Director of Financial Services or his/her designate will receive and score applications in accordance with the evaluation matrix found in Appendix B. A summary will be prepared

and attached to copies of applications for presentation to Council. Council will review submissions as part of the annual budget deliberation process.

**OTHERS CONSULTED:**


Policy development committee.

**FINANCIAL IMPACTS:**

Administration is recommending an annual budget of \$25,500 be established to fund grant requests under the Lakeshore Community Benefit Fund Grant program. This is in conjunction with the annual transfer to the Community Benefit Reserve from the Wind Turbine land use agreements and has no impact to the annual tax revenue base.

Should Council wish to approve more than \$25,500 in a given year, additional funding can be drawn from the Community Benefit Reserve fund provided such funds are available within the fund.

**Prepared by**



Rosanna Pellerito CPA, CGA, CRM  
Director of Finance

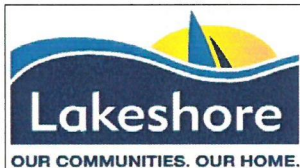
**Approved by**



Truper McBride, MPlan, RPP, MCIP  
Chief Administrative Officer

RP/rp

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APPENDIX A  
CORPORATION OF THE TOWN OF LAKESHORE

419 Notre Dame Street  
Belle River, ON N0R 1A0  
Phone: 519-728-2700

Lakeshore Community Benefit Grant  
Application for Grant Funding

NOTICE TO APPLICANTS -

The Town of Lakeshore policy for Community Benefit Grants is included as part of this application package and should be read prior to completing an Application for Grant Funding under the Lakeshore Community Benefit Grant Fund. Applications will be scored in accordance with the evaluation matrix (APPENDIX B to the Policy). Send completed applications to the attention of the Director of Finance at the Town of Lakeshore, 419 Notre Dame St, Belle River ON, N0R1A0 or by email to [director.finance@Lakeshore.ca](mailto:director.finance@Lakeshore.ca)  
The Deadline for submission is September 30 each year.

GENERAL INFORMATION (must be completed by all applicants)

Name of Organization/Group/Project:

Street Address/PO Box

City/Province Postal Code

Contact Person:

Name & Position

Telephone Number:

Fax Number:

Email Address:

INFORMATION ABOUT YOUR ORGANIZATION (must be completed by all applicants)

Type of Organization: (select one)

☐ Registered Charity

Regist. # : \_\_\_\_\_

☐ Incorporated Not-for-profit

Incorp. # : \_\_\_\_\_

☐ Other (provide details below)

Other: (please specify)

No. of Volunteers in Organization: \_\_\_\_\_

No. of Paid Employees in Organization: \_\_\_\_\_

TYPE OF GRANT & GENERAL GRANT INFORMATION (please select only one)

☐ Cash Grant

Amount: \_\_\_\_\_

☐ In-Kind (provide detail below)

☐ Waive Fees (provide % and details below)

☐ Disaster Relief (provide details below)



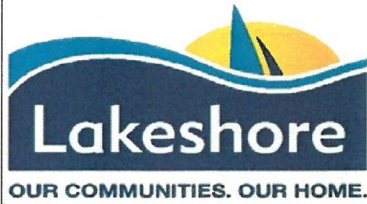
TYPE OF GRANT & GENERAL GRANT INFORMATION (continued from previous page)	
Description of Project/Service Provided by Organization: _____	
_____	
_____	
_____	
_____	
Has your organization received a grant in previous year(s)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, please specify amount of grant per year: _____	
_____	
Will your organization require grants in future years?	<input type="checkbox"/> Yes <input type="checkbox"/> No

PROGRAM / EVENT / PROJECT DETAILS (must be completed by all applicants)
Briefly explain the new program, event or project to be provided by your organization: (Additional information may be attached if space is required)
_____
_____
_____
_____
_____
_____

BENEFIT TO THE TOWN OF Lakeshore (must be completed by all applicants)	
Is your organization based in the Town of Lakeshore?	<input type="checkbox"/> Yes <input type="checkbox"/> No
How will your organization benefit the Town of Lakeshore? _____	
_____	
What is the anticipated # of Town of Lakeshore residents participating or benefiting from the project or service?	
_____	
Demographic Information (existing multi-yr projects/organizations only):	
No. of Town of Lakeshore residents using the service/participating	<input type="text"/> (a)
Total Number of persons using service/participating	<input type="text"/> (b)
% Benefit to the Town of Lakeshore	<input type="text"/> (a) / (b)
Council reserves the right to request membership lists, etc. to support demographic information provided above.	

GRANTS FROM OTHER MUNICIPALITIES (must be completed by all applicants)	
Have you applied for a grant from another municipality?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If you answered yes, please provide details (municipality name, amount requested and whether application has been approved).	
_____	
_____	





APPENDIX B  
CORPORATION OF THE TOWN OF LAKESHORE

419 Notre Dame Street  
Belle River, ON N0R 1A0  
Phone: 519-728-2700

Lakeshore Community Benefit Grant  
Evaluation Matrix

The purpose of the evaluation matrix is to objectively measure requests for funding against the eligibility criteria set out in the attached policy.

This evaluation matrix may be amended from time to time by resolution of Council.

One point will be awarded for each successful factor. Sections will be totaled and multiplied by the stated weighting factor. The grand total of all weighted sections determines the application's overall score.

Evaluation Factors:

Section 2.0 Eligibility Criteria

Submitted complete application.

Submitted application by deadline.

Applicant is a registered charity/ not-for-profit or volunteer group.

Applicant represents a charity or group that has no paid employees.

Subtotal

Weighting Factor

Section Total

Section 3.0 Funding Categories

Request matches funding category (select all that apply)

Social & Community Services

Seniors or Youth

Historical, Arts & Cultural Events or Organizations

Fundraisers for Municipal Projects

Community Beautification & Protection/Preservation of Environment

Disaster Relief

Event Sponsorship

Subtotal

Weighting Factor

Section Total

**Section 3.2 Types of Funding**

Request is for only one type of funding

Request is for in kind services only.

Subtotal  
Weighting Factor  
Section Total**Section 6.1 Sustainability**Application is for less than than **50%** of project costs.\*

\*Applicant must demonstrate ability to finance the balance of the costs

Application is for less than than **25%** of project costs.\*\*

\*\*Additional point

Applicant has not received funding/support in previous 2 years.

Application is for current year only.

Subtotal  
Weighting Factor  
Section Total**Section 6.2 Benefit to Residents of Lakeshore**

Application will benefit how many Lakeshore residents:

Weighting  
Factor

0 - 25 residents

<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>
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26 - 100 residents

<input type="text"/>	<input type="text" value="1"/>	<input type="text"/>
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100 - 500 residents

<input type="text"/>	<input type="text" value="2"/>	<input type="text"/>
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500 - 2000 residents

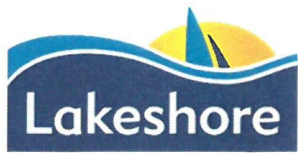
<input type="text"/>	<input type="text" value="3"/>	<input type="text"/>
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2000+ residents

<input type="text"/>	<input type="text" value="4"/>	<input type="text"/>
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APPLICATION GRAND TOTAL (max score 25)





# Community Benefit Fund Grants Policy

Policy # C-FIN-00001

Date Last Reviewed:

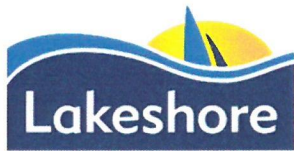
## 1.0 Purpose and Scope

### 1.1 The purpose of this policy is to:

- a) Establish guidelines for funding to organizations that meet the eligibility requirements and funding categories of the Lakeshore Community Benefit Fund (LCBF);
- b) Define the types of organizations that are eligible for funding;
- c) Establish eligible funding categories;
- d) Define funding mechanisms;
- e) Define the requirements for an annual application process for grant requests; and
- f) Ensure fairness and consistency in providing funding to qualifying organizations.

### 1.2 Only those organizations that meet all of the following criteria will be considered for a grant under the LCBF:

- a) The "Organization" is a:
  - a) Charitable organization registered with the Canada Revenue Agency;
  - b) Registered not-for-profit organization;
  - c) Association or society otherwise recognized at law that is not-for-profit.
- b) The Organization seeking a grant under the LCBF must provide services that fall into one of the funding categories identified in Section 2.1 "Funding Categories";
- c) The Organization must:
  - a) Be located in the Town of Lakeshore; or
  - b) Conduct itself in a way that provides a benefit to residents of the Town of Lakeshore.



# Community Benefit Fund Grants Policy

Policy # C-FIN-00001

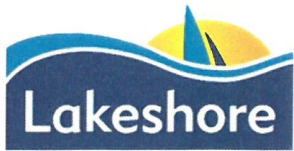
Date Last Reviewed:

- 1.3 This policy excludes Town support offered through the Grant Fund Policy AD-0069.
- 1.4 Organizations submitting grant requests for multiple years will be referred to the Grants Policy AD-0069.
- 1.5 The Community Benefit Fund is meant for one time funding of projects or initiatives and is not intended to fund:
  - a) the waiver of fees relating to development charges, building permit, planning fees;
  - b) deficits from operations of past years;
  - c) projects or initiatives that duplicate or resemble projects or initiatives offered by the Town.

## 2.0 Definitions

### Funding Categories

- 2.1 **Social & Community Services:** services that respond to the basic needs and safety of residents within the community, including referral, information and assistance in a variety of areas such as health care, food, clothing, shelter, government services, counseling, employment, etc. and services which promote healthy communities.
- 2.2 **Senior or Youth:** Programs or activities directed towards the youth or senior population.
- 2.3 **Historical, Arts & Cultural Events or Organizations:** Events and activities which serve to celebrate history, arts and culture, or gather, document, preserve or otherwise maintain information and artifacts of an historical or cultural value.



# Community Benefit Fund Grants Policy

Policy # C-FIN-00001

Date Last Reviewed:

- 2.4 Fundraisers for Municipal Projects:** Fees may be waived for fundraisers held in a municipal facility, whose sole purpose is to raise funds for a municipal project to construct, rehabilitate or maintain municipal infrastructure. Assistance provided in this category will be prorated based on the proportion of funds raised and directed towards municipal projects to total funds raised.
- 2.5 Community Beautification & Protection/Preservation of the Environment:** includes projects which serve to enhance or beautify the Town of Lakeshore or preserve and protect the environment.

## Types of Funding

The following types of funding requests will be entertained under the LCBF. Applications will be limited to requests for one type of funding only.

- 2.6 Grants:** The Town of Lakeshore may award cash grants, up to a maximum of 50%, of the cost for the following:
- a) Start-up costs for new programs;
  - b) Special events; or
  - c) Capital projects.

The applicant will be required to demonstrate that they have the funding available, or a viable financial plan, to fund the balance of the cost.

- 2.7 In-Kind Assistance:** includes work performed for the organization by Town of Lakeshore employees during regular hours while employed by the Town (for example: snow removal, grass cutting, barricade placement, traffic control).
- 2.8 Waiver of Fees:** one time waiver of all or a portion of the fees normally charged for the use of space in a municipal facility.





# Community Benefit Fund Grants Policy

Policy # C-FIN-00001

Date Last Reviewed:

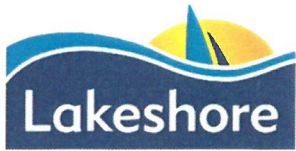
## **3.0 Applications for Funding under the Lakeshore Community Benefit Fund**

- 3.1** An Organization requesting funding under the Lakeshore Community Benefit Grant Fund must submit an application using the “Application for Funding under the Lakeshore Community Benefit Fund” contained in Appendix A.
- 3.2** All information requirements outlined in the application must be included with an application.
- 3.3** Applications for operating grants, capital grants and in-kind grants for the following funding categories will only be considered on an annual basis. The deadline for submissions for grant applications is September 30th for approval in the following year’s budget:
  - a) Social & Community Services;
  - b) Seniors or Youth;
  - c) Historical, Arts & Cultural Events or Organizations;
  - d) Community Beautification & Protection/Preservation of the Environment.
- 3.4** Only one application per organization will be considered in a calendar year. All programs, projects and undertakings requiring grant funding for an organization must be consolidated into one application.
- 3.5** Applications will only be considered from an Organization if they are submitted prior to the commencement of a project or initiative and before any costs associated with the project or initiative are incurred.
- 3.6** If an Organization applying for a grant has a financial surplus or reserve from prior years’ operations and it is not designated for a specific purpose, the amount of the surplus or reserve will be deducted from any grant approved for the organization.

## **4.0 Processing Applications**

- 4.1** All grant applications will be assessed solely on the information provided in the application on or before the deadline.





# Community Benefit Fund Grants Policy

Policy # C-FIN-00001

Date Last Reviewed:

- 4.2** All applications for operating grants, capital grants and in-kind grants for the September 30th deadline will be reviewed for completeness by the Director of Finance who will score the requests based on the evaluation matrix and provide to Council for approval as part of the annual budget process. Applicants will be advised of the status of their grant application after budget adoption by Council.
- 4.3** All other applications submitted throughout the year will be reviewed by the Director of Finance and considered by Council at the earliest possible meeting date following receipt of the request.
- 4.4** The granting of assistance in any year is not to be regarded as a commitment by the Town of Lakeshore to continue assistance in future years.

## **5.0 Payment of Approved Grants**

- 5.1** Successful applicants will be required to enter into a contract with the Town.
- 5.2** Grants will be paid to recipients within 30 days of approval.
- 5.3** Grant recipients may be required, upon request, to provide financial documentation (ex: receipts) to verify that grant proceeds were applied towards their intended purpose as outlined in their grant application.

## **6.0 Recognition**

- 6.1** Grant recipients are required to acknowledge the Town of Lakeshore's contribution to their project in a manner approved by the Town of Lakeshore.
- 6.2** All recognition must be approved by the Town of Lakeshore prior to printing, posting or distributing the material.

## **7.0 Repayment of Grants**

- 7.1** Grant recipients shall repay the whole or any part of the grant as determined by the Town of Lakeshore if the grant recipient:
  - a) Ceases operating;
  - b) Ceases to operate as a non-profit, charitable or volunteer group;



# Community Benefit Fund Grants Policy

Policy # C-FIN-00001

Date Last Reviewed:

- c) Merges or amalgamates with any other party;
- d) Knowingly provides false information in a grant application;
- e) Uses grant funds for purposes other than those identified in the grant application and subsequently approved by the Town of Lakeshore;
- f) Breaches any other terms or conditions of the LCBF;
- g) Breaches any of the provisions of the Human Rights Code or Criminal Code in its operations;
- h) The Organization uses the grant funding for a purpose other than which it was approved; or
- i) Acts in the capacity of funding body for, or makes grants or transfers funds to any other group or organization.

**7.2** Any unused portion of a grant paid to a grant recipient remains the property of the Town of Lakeshore and must be repaid by the recipient upon request.

**7.3** It is recognized that organizations that receive grant funding may have a year-end that is different from the Town's fiscal year end. The determination of funding use will be assessed based on the grant recipient's year end.

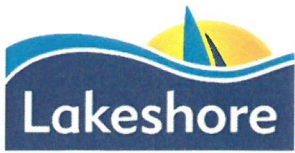
## **8.0 Applications Budget for the Lakeshore Community Benefit Fund**

**8.1** The total value of grants provided through the LCBF will be limited to annual budget allocations approved by Council.

**8.2** The Town reserves the right to adjust awards to approved recipients if the total of approved requests exceeds the recommended annual maximum.

## **9.0 Responsibilities**

**9.1** The Director of Finance or his/her designate will receive and score applications in accordance with the evaluation matrix found in Appendix B. A summary will be prepared and attached to copies of applications for presentation to Council.



# Community Benefit Fund Grants Policy

Policy # C-FIN-00001

Date Last Reviewed:

- 9.2** Council will review submissions as part of the annual budget deliberation process.
- 9.3** Council is responsible for allocating resources for the successful implementation of the LCBF during the annual budget process.
- 9.4** Successful applicants are responsible for ensuring truthful accurate information is provided to the Town and to notify the Town of any changes that may affect the grant award. Successful applicants are also required to use the funds in accordance with the grant agreement.

## **10.0 Consequences**

- 10.1** Refer to section 7.0 above.

## **11.0 Reference Documents**

- 11.1** Annual Budget
- 11.2** Grants Policy AD-0069
- 11.3** Lakeshore Community Benefit Fund Application Form (Appendix A to this policy)
- 11.4** Evaluation Matrix (Appendix B to this policy)

## **12.0 Communication and Training**

- 12.1** This policy will be communicated to all staff and Council.
- 12.2** This policy will be included on the Town Website
- 12.3** Training will be provided to staff and Council.

## **13.0 Review/Revisions**

- 13.1** This policy will be reviewed annually as needed
- 13.2** Identify within chart each revision, by whom and when.



# Community Benefit Fund Grants Policy

Policy # C-FIN-00001

Date Last Reviewed:

#	Date Revised	Author	Section	Details of Change
1	October 22, 2019	Rosanna Pellerito		Created Policy
2				
3				
4				
5				

Refer policy questions to the Director of Finance



<b>Policy: Grant Requests</b>	<b>Policy #: AD-069</b>
<b>Department: Administration</b>	<b>Effective Date: September 9, 1999</b>
	<b>Revision Date: July 10, 2009 May 18, 2012 September 16, 2019</b>

## 1.0 Purpose

- 1.1 To define a policy for the administration of grant requests received by or submitted to the Town of Lakeshore.

## 2.0 Scope

- 2.1 This policy covers all requests for grants received by the municipality

## 3.0 Policy

- 3.1 All grant requests received shall be acknowledged and the requestor referred to this policy.
- 3.2 As of the year 2000, the municipality will discontinue approval of further grants with the exception of;

ORGANIZATION	AMOUNT	PURPOSE OF GRANT
Comber Historical Society	\$10,000	Ongoing operations
Maidstone Historical Society	\$10,000	Ongoing operations
Club de L'Age D'or	\$11,320	Match grant program under Seniors Active Living Centres Act
Good Neighbour Club	\$12,677	Match grant program under Seniors Active Living Centres Act
Comber Agricultural Society	\$2,500	Policing for Comber Fair
Belle River On the Lake BIA	\$2,500	Policing for Sunsplash Festival
	In-kind services	<ul style="list-style-type: none"> <li>Banking, accounting, insurance and IT functions</li> <li>office space and supplies</li> <li>staffing and equipment for the installation of lights and banners on streetlights</li> </ul>
Comber Chapter IODE	\$1,120 (waiver of fees)	Waiver of rental fees for events at Comber Community Centre

- 3.3 Council will consider the grants previously approved for those organizations separately subject to budget availability.
- 3.4 Grant requestors may be referred to the other venues for funding or to the Town's Community Benefit Fund.

#### **4.0 Responsibility**

- 4.1 It is the responsibility of the Chief Administrative Officer to ensure staff is aware of and follow this policy.
- 4.2 It is the responsibility of staff to follow this policy.

#### **5.0 Consequences**

- 5.1 Failure to follow this policy may result in disciplinary action.
- 5.2 Failure to follow this policy may result in inaccurate information being provided to the Town of Lakeshore community.

#### **6.0 References**

- 6.1 There are no references at this time.