



# 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.



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- 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.



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- 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.



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## **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.



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- 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;



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- c) Merges or amalgamates with any other party;
- d) Knowingly provides false information in a grant application;
- e) Breaches any other terms or conditions of the LCBF;
- f) Breaches any of the provisions of the Human Rights Code or Criminal Code in its operations;
- g) The Organization uses the grant funding for a purpose other than which it was approved; or
- h) 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.

**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.



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**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.

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



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3				
4				
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Refer policy questions to the Director of Finance