



STAFF REPORT EXECUTIVE SUMMARY & RECOMMENDATION

The following executive summary provides a brief description about the report and the recommendation advises on any action being requested from Council.

Subject: Council Discretionary Grant Program Guidelines

Executive Summary:

The Council Discretionary Grant Program was established for the purpose of providing financial assistance to eligible individuals or organizations where such requests do not fit into any other funding opportunity. The policy has been updated to incorporate recent asks from community groups.

Recommendation:

1. **That Staff Report DSR-120-23 regarding Council Discretionary Grant Program Guidelines dated September 13, 2023, be received; and**
2. **That Council adopt the Council Discretionary Grant Program Guidelines; and**
3. **That Staff be directed to post the Guidelines and re-open the formal application process.**

Council Discretionary Grant Program Guidelines



Staff Report DSR-120-23

To: Mayor, Deputy Mayor, and Members of Council

From: Karen Shea, Chief of Staff

Date: September 13, 2023

Recommendation:

- 1. That Staff Report DSR-120-23 regarding Council Discretionary Grant Program Guidelines dated September 13, 2023, be received; and**
- 2. That Council adopt the Council Discretionary Grant Program Guidelines; and**
- 3. That Staff be directed to post the Guidelines and re-open the formal application process.**

Background:

In 2013, Town of Innisfil Council introduced a Council Discretionary Grant Program with the goal of extending financial support to eligible organizations facing funding challenges who were unable to obtain funding through available grant funding opportunities.

By 2019, a recommendation was approved by Council for the redirection of funds from the Town's current grant programs toward a new Innisfil Community Foundation. As part of that process, the existing Council Discretionary Grant Program that had been funded through revenue from the Ontario Lottery & Gaming allocation ceased and an allocation of \$20,000 was allotted as part of the 2021/2022 operating budget and funded from the tax levy.

In 2022, when one of the discretionary fund grant applications was brought before Council, a sitting member expressed apprehension regarding the nature of some applications being submitted from community groups. The specific application request was to fund a third-party scholarship, that overlapped with a scholarship that Council was already directly supporting. In response, a request was made to reevaluate the Program's Guidelines, aiming to exclude such applications that were not directly benefiting the requesting applicant.

Analysis/Consideration:

Overall, the Council Discretionary Grant Program has delivered substantial advantages over the last ten years and was only in need of minor adjustments. Specifically, modifications were made to the Guidelines to curtail applications from organizations seeking funds destined for third parties, eliminating potential redundancy in funding organizations that were already supported by Council. This enhancement contributes to a more efficient allocation of resources.

To enhance efficiency and expedite the application process, modifications were implemented to allow funding requests falling below the \$500 threshold to be reviewed and approved by Staff. Applications with funding requests exceeding the \$500 threshold will continue to be brought before Council for review, ensuring comprehensive evaluation and alignment with strategic objectives.

Community Strategic Plan Alignment:

Our Community Strategic Plan underscores the importance of supporting initiatives that advance community well-being, and resilience, while also bolstering community engagement. By fostering a sense of unity within our town and promoting residents' access to events and activities, we can effectively achieve these strategic priorities.

Financial Consideration:

The allocation of \$20,000 has already been approved within the current 2023/2024 operation cycle and there would be no direct financial implications for the Corporation. Council could decide to abstain from utilizing these funds, as a potential cost-saving measure.

Historical data indicates that, on average, approximately \$15,000 dollars are requested each year from the Council Discretionary Grant Program. However, it is important to note the evolving economic landscape and that with the tightening economic circumstances, there is a possibility of increased demand for these funds among individuals and community groups seeking assistance.

In the scenario where the allocated funds are fully utilized within a budget year, the acceptance of new applications would be temporarily put on hold until the start of the new budget year.

Local Impact:

Through the re-launch of the updated Council Discretionary Grant Program, Council will be able to offer monetary support to qualified individuals or groups that lack access to alternate funding sources. These resources will contribute to supporting activities related to sports, senior engagement, youth initiatives, local events, arts, culture and heritage initiatives, economic stimulation, and, more broadly, community building.

Options/Alternatives:

Council could opt to suspend the Council Discretionary Grant Program and suggest additional revisions to the proposed guidelines. Alternatively, Council could choose to discontinue the program as a cost-saving measure.

Conclusion:

Council discretionary grants can play a pivotal role in generating excitement and awareness around local initiatives and fostering community spirit. The adoption of the revised guidelines will help to ensure that these grants will go directly to those groups that require funding and will allow for the program to be re-opened and accessed by the public.

Prepared By:

Karen Shea, Chief of Staff

Approved By:

Oliver Jerschow, Chief Administrative Officer

Attachments:

Attachment 1 – Council Discretionary Grant Program Guidelines

Attachment 2 – Council Discretionary Grant Program Guidelines Blackline

Attachment 3 – Council Discretionary Grant Program Application

Reference Material: [Staff Report DSR-120-19 - Community Foundation Fund Update](#)
[Community Strategic Plan](#)



COUNCIL DISCRETIONARY GRANT PROGRAM GUIDELINES

The Council Discretionary Grant Program

The Council Discretionary Grant Program is established for the purpose of providing financial assistance to eligible individuals or organizations where such requests do not fit into any other funding opportunity. Applicants are still encouraged to demonstrate how the request satisfies one or more of the priorities outlined within the Town's Strategic Plan.

An application shall be required in most situations. However, Council may access the Council Discretionary Grant Program without a formal application for one-time occurrences such as disaster relief, extending support and assistance to other municipalities to support municipal affiliates in advocacy of local issues.

1.0 Community Initiative

Provide grants to community organizations and individuals where the primary purpose is to enhance the quality of life of Town of Innisfil residents, showcase the Town of Innisfil's diversity and appeal and/or contribute to community excellence. The program may support activities related to sports, seniors, youth organizations, special events, arts, culture, heritage, the economy and, more broadly, our community. Sports grants must benefit all residents and will not be issued for team use only.

Applicants can request a maximum of \$1,000 per year.

Eligible projects are expected to demonstrate alignment with the Town's strategic plan and the funding awards will be determined in part by the ability of the applicant to show how the application furthers the Town's strategic objectives under the pillars: Grow, Connect, and Sustain.

2.0 Council Initiative

Council Members may request an application to support an individual or organization on a one-time occurrence such as a fee waiver, event insurance waiver, of less than \$500 at any time during the calendar year.

3.0 Eligibility

Applicants are eligible to apply for funding if they represent an organization based in Innisfil or are an individual who permanently resides in Innisfil and who is at least 18 years of age. Applicants who are under the age of 18 may apply with parental or guardian consent.

Applications will be measured against the strategic objectives of the Town's current strategic plan and Council reserves the right to require an applicant to supply any additional information necessary to evaluate a funding request, including but not limited to financial and banking statements.

4.0 Application Process

- a. Applications must be submitted using the Council Discretionary Grant Application Form which can be found on the Town of Innisfil website. (link to be inserted following Council adoption)

- b. Applications shall be received on an ongoing basis throughout the year for Council's consideration at regular meetings of Council.
- c. Applications must be received at least 60 days before the Council meeting at which Council will consider the request.
- d. Applications made through the Council Discretionary Grant Program of less than \$500 will be reviewed by Staff and, if eligible, discretionary authority approval will be used to approve applications as they are received throughout the year.
- e. Applications made through the Council Discretionary Grant Program of more than \$500 will be provided to Council for review and consideration as they are received throughout the year.
- f. Should funding for the Council Discretionary Grant Program become fully expended at any point during the year, applications will be closed for the duration of the calendar year.
- g. Applications must be complete when received, including any required signatures, and supporting documents. Incomplete applications will be returned to the applicant for re-submission.
- h. Successful applicants are not eligible to receive subsequent grants for the same purpose.
- i. Applicants are eligible to receive one grant per calendar year per event, project, or purpose to a maximum of \$1,000.
- j. The evaluation process is a competitive process and there is no guarantee that any award will be granted, or that the amount requested will be awarded in full.
- k. Applications are ineligible if the requested funds are to be used to subsidize normal operating costs or bursaries, or funding requests that are not intended for the recipient organization or funding for sports teams that do not meet community benefit criteria.
- l. Only applications via mail or email (officeofthemayor@innisfil.ca) will be accepted.
- m. Completed applications are to be submitted to:

Council Discretionary Grant Program
The Town of Innisfil
2101 Innisfil Beach Road, Innisfil ON L9S 1A1
Attention: Mayor's Office
officeofthemayor@innisfil.ca

5.0 The Evaluation Process

- a. Staff will receive applications and supporting documents and will determine if discretionary authority may be exercised to approve funding request applications under \$500.
- b. Applications over \$500 will be considered by Council via a staff report at a regular meeting of Council, within the 60-day application window.
- c. Should funding for the Council Discretionary Grant Program become fully expended at any point during the year, applications will be closed for the duration of the calendar year.

6.0 Appeals

There is no opportunity to appeal a decision regarding the Council Discretionary Grant Program.

7.0 Recognition Requirements

Funding recipients must recognize the Town of Innisfil for its financial support in any communications, activities or materials related to the project. This may include the Town of Innisfil logo accompanied by the text “The [name of project] is supported by the Town of Innisfil.” Use of the corporate Town logo is subject to the Town of Innisfil brand guidelines which will be supplied to successful applicants.

Reasonable effort should be made to notify Council via officeofthemayor@innisfil.ca of media events or photo opportunities with Council and the beneficiary(ies).

8.0 Applicant Reporting Requirements

A final report is not a mandatory requirement for Council Discretionary Grant Program approval. However, Council may request a final report in some instances at its discretion.

Upon completion of the applicant’s approved project of initiative, any surplus funds in excess of \$100 will be returned to the Town.



COUNCIL DISCRETIONARY ~~FUND~~GRANT PROGRAM GUIDELINES

The Council Discretionary ~~Fund~~Grant Program

The Council Discretionary ~~Fund~~Grant Program is established for the purpose of providing financial assistance to eligible individuals or organizations where such requests do not fit into any other funding opportunity. Applicants are still encouraged to demonstrate how the request satisfies one or more of the priorities outlined within the Town's Strategic ~~Objectives~~Plan.

An application shall be required in most situations. However, Council may access the Council Discretionary ~~Fund~~Grant Program without a formal application for ~~those~~ one-time occurrences such as disaster relief ~~where~~, extending support and assistance to other municipalities to support municipal affiliates in advocacy of local issues.

1.0 Community Initiative

Provide grants to community organizations and individuals where the primary purpose is to enhance the quality of life of Town of Innisfil residents, showcase the Town of Innisfil's diversity and appeal and/or ~~make sure all businesses excel~~contribute to community excellence. The fund may support activities related to sports, seniors, youth organizations, special events, arts, culture, heritage, the economy and, more broadly, our community. ~~The criteria are Sports grants must benefit all residents and will not including support be issued for sport teams to team use for their group only—must be open to residents.~~

Applicants can request a maximum of \$1,000 per year.

Eligible projects are expected to demonstrate alignment with the Town's strategic plan and the funding awards will be determined in part by the ability of the applicant to show how the application furthers the Town's strategic objectives under the pillars: Grow, Connect, and Sustain.

2.0 Council Initiative

Council ~~Member~~Members may request an application to support an individual or organization on a one-time occurrence such as a fee waiver, event insurance waiver, of less than \$500 at any time during the calendar year.

3.0 Eligibility – Council Discretionary Fund

Applicants are eligible to apply for funding if they represent an organization based in Innisfil, or are an individual who permanently ~~resides~~resides in Innisfil and who is at least 18 years of age. Applicants who are under the age of 18 may apply with parental or guardian consent.

Applications will be measured against the strategic objectives of Inspiring Innisfil 2020.
<https://innisfil.ca/wp-content/uploads/2019/06/2016.05.11-II2020-Strategic-Plan-2017-2020-FINAL.pdf>

the Town's current strategic plan and Council reserves the right to require an applicant to supply any additional information necessary to evaluate a funding request, including but not limited to financial and banking statements.

4.0 The Application Process – Council Discretionary Fund

- a. Applications must be submitted using the Council Discretionary Grant Application Form- which can be found on the Town of Innisfil website. (link to be inserted following Council adoption)
- b. Applications shall be received on an ongoing basis throughout the year for Council's consideration at regular meetings of Council.
- c. Applications must be received at least ~~1560~~ days ~~prior to~~before the Council meeting at which Council will ~~be considering~~consider the request.
- d. Applications made through the Council Discretionary Fund-Grant Program of less than \$500 will be reviewed by Staff and, if eligible, discretionary authority approval will be used to approve applications as they are received throughout the year.
- d.e. Applications made through the Council Discretionary Grant Program of more than \$500 will be provided to Council for review and consideration and review as they are received throughout the year.
- e.f. Should funding for the Council Discretionary ~~Fund-Grant Program~~ become fully expended at any point during the year, applications will be closed for the duration of the calendar year.
- f.g. Applications must be complete when received, including any required signatures, and supporting documents. Incomplete applications will be returned to the applicant for re-submission.
- g.h. Successful applicants are not eligible to receive subsequent grants for the same purpose. However, Council shall encourage community groups to include provisions for payment of fees in subsequent years as part of their sustainability plan.
- h.i. Applicants are eligible to receive one grant per calendar year per event, project, or purpose to a maximum of \$1,000.
- i.j. The evaluation process is a competitive process and there is no guarantee that any award will be granted, or that the amount requested will be awarded in full.
- k. Applications are ineligible if the requested funds are to be used to subsidize normal operating costs or bursaries, or funding requests that are not intended for the recipient organization or funding for sports teams that do not meet community benefit criteria.
- j.l. Only ~~original~~-applications via mail or email (officeofthemayor@innisfil.ca) will be accepted.
- k.m. Original-completed~~Completed~~ applications are to be submitted to:

Council Discretionary ~~Fund-Grant Program~~
The Town of Innisfil
2101 Innisfil Beach Road, Innisfil ON L9S 1A1
Attention: ~~Clerks Services~~ Mayor's Office
officeofthemayor@innisfil.ca

5.0 The Evaluation Process – Council Discretionary Fund

- a. ~~Clerks services staff~~ Staff will receive applications and supporting documents, ~~to and will~~ determine if discretionary authority may be exercised to approve funding request applications under \$500.

- b. Applications over \$500 will be considered by Council via a staff report at the most appropriate regular meeting of Council, as applications are received within the 60-day application window.
- c. ~~Applications will be provided to Council for consideration and review as they are received throughout the year.~~
- d. ~~c.~~ Should funding for the Council Discretionary Fund Grant Program become fully expended at any point during the year, applications will be closed for the duration of the calendar year.

6.0 Appeals

There is no opportunity ~~for~~to appeal ~~of the~~a decision regarding the Council Discretionary Fund.

7.0 Recognition Requirements

Funding recipients must recognize the Town of Innisfil for its financial support in any communications, activities or materials related to the project. This may include the Town of Innisfil logo accompanied by the text "The [name of project] is supported by the Town of Innisfil." Use of the corporate Town logo is subject to the Town of Innisfil brand guidelines which will be supplied to successful applicants.

Reasonable effort should be made to notify Council via officeofthemayor@innisfil.ca of media events or photo opportunities with Council and the beneficiary(ies).

8.0 Applicant Reporting Requirements

- A final report is not a mandatory requirement for Council Discretionary Fund Grant Program approval.
- However, Council may request a final report in some instances at its discretion.

Upon completion of the applicant's approved project of initiative, any surplus funds in excess of \$100 will be returned to the Town.



COUNCIL DISCRETIONARY GRANT
PROGRAM APPLICATION FORM

Date of Event: _____	Office Use Only: \$
Purpose of Application:	
Waiver of Parking Fees at Innisfil Beach Park*	
Parking Lot (s): A B C D E F	
Waiver of Facility Rental Fees*	
Rental Permit # _____	
Rental Amount: \$ _____	
Date of Event: _____	
Other	
Description: _____	
Amount: \$ _____	
Approvals for waiving of these fees will not be considered on a re-curring basis.	

Date Received: _____
Total Amount of Funds Requested: _____

Details of your funding request	
Name of Applicant: _____	
Name of Organization (if applicable): _____	
Mailing Address: _____	
Name of Primary Contact: _____	Title: _____
Phone Number (Primary): _____	Alternate Number: _____
E-mail Address: _____	
Section 1 – Personal Application:	
Are you under 18 years of age? Yes No	

If Yes, please provide the signature of a parent or legal guardian.

Signature of Parent or Legal Guardian

Print Name of Parent or Legal Guardian

If No, please provide signature.

Signature

Print

Section 2 – Organization Application:

Provide the signature of two (2) executive members. A current listing of Executive Membership or your organization's Directors must be attached to this application.

Signature of Executive Member

Print Name and Title of Executive Member

Signature of Executive Member

Print Name and Title of Executive Member

Eligibility Criteria

1. Provide a brief description of the purpose of your grant request:

2. Please provide details of community support for your project or event. Please include the age range, population segment, and numbers expected to benefit, from the project or event.

3. Please indicate which of the following Strategic Goals within the Town's Strategic Plan, apply to your application. Select all that apply, and give a brief description of how.

Grow (Developing a thriving community)
Details:

Connect (Physical, social, cultural and digital connections)
Details:

Sustain (Enhance the environment, assets & amenities residents depend on)
Details:

*the Town's current Strategic Plan can be found at www.innisfil.ca

4. Have you or your organization applied for and received funds from the Council Discretionary Grant program in the last two years?

Yes No

If yes, please indicate the amount you received \$_____, the date the funds were received _____, and the purpose for the grant:

5. What measures have you, or will you put in place to make your organization more financially sustainable?

Please indicate the number of pages provided as attachments to this submission: _____ pages

Personal information collected on this form is pursuant to the Municipal Freedom of Information and Protection of Privacy Act, R.S.O. 1990, Chapter M.56, as amended, and will be used to inform applicants of the Town's grant programs announce successful applications to the public and may be released to other funding organizations. Questions about this collection should be directed to: Clerk's Office, Town of Innisfil, 2101 Innisfil Beach Road, Innisfil ON, L9S 1A1, 705-436-3710.



COUNCIL DISCRETIONARY GRANT PROGRAM APPLICANT'S CHECKLIST

This checklist must be included with the application.

I have reviewed the Council Discretionary Grant Program application guidelines and have attached a complete application which includes the supporting documents and actions indicated on the checklist, below.

Included rental permit #, and rental amount, if applying for waiver of facility rental fees.

Current signatures of two (2) executive members, and a current listing of Executive Membership of organizations Directors.

Description of purpose of grant request along with details of community support for project or event.

Explanation of Strategic Goals apply to your application.

Indication if you or your organization have applied and received funding from this program in the last 2 years.

Explanation of what measures you or your organization have in place to be financially sustainable.

I accept responsibility for provision of all required documents including a complete application form. If approved, I further understand that there is a requirement for a follow-up report to be provided.

Print Name of Individual Making Application

Signature of Individual Making Application

Date Signed