

Management Directive



Management Directive No.:	MD2018-005
Management Directive Name:	Community Partnership and Development Fund Program Management Directive
Date Approved by CAO or Designated Person:	April 24, 2018
Date revision approved by CAO or Designated Person:	August 3, 2023
Related SOP, Management Directive, Council Policy, Forms	Replaces CP2016-008

Directive Statement and Rationale:

The Corporation of the City of Kawartha Lakes acknowledges the efforts of volunteer organizations located within the City.

The City has the opportunity to provide an avenue to create partnerships with these volunteer organizations to provide for the betterment of the City.

The City wishes to support volunteer organizations yet not have such organizations become reliant on such supports thereby potentially eroding the strength and independence of such organizations.

The City wishes to provide financial assistance and support to these community organizations and associations in recognition of these groups as a valuable resource in helping the municipality provide a strong community focus.

The Municipal Act, Section 107 (1), General power to make grants, acknowledges Council's authority to provide financial assistance through the following statement,

Despite any provision of this or any other Act relating to the giving of grants or aid by a municipality, subject to section 106, a municipality may make grants, on such terms as to security and otherwise as the council considers appropriate, to any person, group or body, including a fund, within or outside the boundaries of the municipality for any purpose that council considers to be in the interests of the municipality.

The City therefore establishes this policy to guide the distribution of Community Partnership and Development Funds for the purpose of providing operating funding support to various community-based, not-for-profit organizations.

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Scope:

The Community Grants Program consists of four separate elements – Beautification Fund, Culture Fund, Special Events Fund, and the Municipal Tax Rebate Fund. The program is administered by the Community Services Department in conjunction with Council.

The Community Partnership and Development Fund Program policy addresses the process for the request and distribution of operating and/or minor capital funds to be used in partnership with local community organizations to provide financial support for such organizations that provide a valuable resource and service to the municipality and its residents.

Definitions:

In reading and interpreting the Community Partnership and Development Fund Program policy, the following definitions apply:

"City" means the Corporation of the City of Kawartha Lakes.

"Community Organization" means a local community group or association which operates as a not-for-profit organization, is volunteer based, and provides a valuable resource or service to the municipality and its residents. Committees of Council are not considered an eligible "Community Organization" and therefore are not eligible for funding under this program.

"Matching Funds" means that a community group must provide equal funding, services /donations in kind to be included, in order to be eligible to receive funding.

"Milestone Special Event" means a quarter century event being planned/hosted by a not-for-profit organization and is intended as a community celebration for local residents.

"Beautification" means a project or initiative that benefits the local community or City as a whole. This would include but not be limited to such projects as horticultural/downtown initiatives (hanging baskets, flower beds), seasonal displays (banners, seasonal decorations) and welcome signage (including entrance features on municipally owned road allowances).

"Culture" means a project or initiative which enhances the area of arts, historical importance, and intellectual achievement.

"Special Event" means any community activity that is a one-time or annual occurrence being hosted/organized by a not-for-profit organization and is for the purpose of a local community celebration without an expectation of profit generation.

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Beautification Fund

- 1.01 Total funding allotment for this fund will be allocated City wide as determined by the Annual Operating Budget of the Community Services Department.
- 1.02 Community Organizations must apply in writing to the Community Services Department prior to October 31st for projects and/or initiatives scheduled for the next calendar year.
- 1.03 The applying Community Organization must provide proof of matching funds to be considered eligible for funding allotment. For the purposes of this Program, the non-cash component of the matching funds may represent no more than 25% of the matching contribution. Hours of time contributed by volunteers are to be valued at \$15 per hour if they are used as part of the matching funds contribution and will be considered as part of the 25% non-cash component.
- 1.04 The applicant must provide a detailed description and any necessary approvals for the proposed use of the funds and the funds must only be used for operating purposes or those capital initiatives of a minor nature.
- 1.05 The funding must be used for the purpose of streetscape beautification project(s) within the City of Kawartha Lakes and are limited to downtown areas, entrance areas (including those on road allowances), community properties and/or Parks and Recreation Division facilities/properties.
- 1.06 Organizations are limited to one beautification funding request per year.
- 1.07 A year-end accounting and summary of the project or initiative must be submitted to the Community Services Department by December 31st.
- 1.08 Proposals will be reviewed and authorized by the Director of Community Services, or designate and reported on to Council for information purposes. However, in the event there is more demand for a program than funds, recommendations for the use of the funds will be made to Council.

2.0 Culture Fund

- 2.01 Total funding allotment for this fund to be considered as City wide.
- 2.02 Community Organizations must apply in writing to the Community Services Department prior to October 31st for projects and/or initiatives scheduled for the next calendar year.
- 2.03 The applicant must provide a detailed description of the proposed use of the funds. The funds must be used for operating purposes only. The initiative will

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support not for profit cultural groups when they choose to enhance their programs and services through marketing and promotional material or activities, excluding advertising. Funding will not support the offset of staff wages or contracts. Eligible organizations include, but are not limited to, Museums, Galleries, Twinning Committees, Theatres, Artisans collectives.

- 2.04 A year-end accounting and summary of the project or initiative must be submitted to the Community Services Department by December 31st.
- 2.05 Organizations are limited to one funding request/project per calendar year. A maximum of \$2000 can be allotted to any one Community Organization per year.
- 2.06 Proposals will be reviewed and authorized by the Director of Community Services, or designate and reported on to Council for information purposes. However, the event there is more demand for a program than funds, recommendations for the use of the funds will be made to Council.

3.0 Special Events

- 3.01 Total funding allotment for this fund to be allocated City wide.
- 3.02 Historically most funding requests and grants for Special Events purposes have on average been \$500 or less. For this purpose the maximum funding allotted to an event in any calendar year will be \$500. This will allow for a greater number of Community Organizations/events to benefit from the program.
- 3.03 Only Special Events being planned and hosted by a not-for-profit organization will be considered eligible. Commercial/retail activities such as business anniversaries, Sidewalk Sales or Midnight Madness are not eligible. Municipal Events are not eligible to receive special event funding.
- 3.04 Events which are being hosted with a purpose to generate a surplus of revenue over expenses are not considered eligible to receive grant funding. This includes fund raising style events (benefit style, charitable donation purpose, etc.)
- 3.05 New events will receive more consideration than events that have received consecutive funding in the past. This will allow for a greater number of Community Organizations/events to benefit from the program.
- 3.06 Groups receiving the fee waived while using Parks and Recreation facilities are deemed ineligible through this program.
- 3.07 Community Organizations must apply in writing to the Community Services Department prior to October 31st for events scheduled for the next calendar year. Applications submitted in the second round of funding must be for events taking place after July 31st.

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- 3.08 The applicant must provide a detailed description of the proposed use of the funds and the funds must be used for operating purposes only.
- 3.09 Food, wages, gifts, and cash prizes are not considered eligible expenses.
- 3.10 Organizations are limited to one funding request for one special event per year. Each Special Event is limited to one funding request.
- 3.11 All funds must be expended during the calendar year applied for or future year's applications will not be considered eligible.
- 3.12 A year-end accounting and summary of the project or initiative must be submitted to the Community Services Department by December 31st.
- 3.13 Proposals will be reviewed and authorized by the Director of Community Services, or designate and reported on to Council for information purposes. However, in the event there is more demand for a program than funds, recommendations for the use of the funds will be made to Council.
- 3.14 Program applicants are encouraged to seek any and all alternate sources of funding but are advised that application to this program precludes application to any other source of special event funding that may be provided by the City.

4.0 Municipal Tax Rebate Program

- 4.01 Total funding allotment for this fund will be allocated City wide. This fund is established to "grandfather" those community organizations which traditionally receive a municipal tax rebate. Such organizations provide recreational services and facilities for the general public.
- 4.02 The amount available for this fund will need to be reviewed annually to allow for annual revisions to municipal taxes, and will be determined during the preparation of the Annual Operating Budget of the Community Services Department.
- 4.03 Community Organizations must apply in writing to the Community Services Department prior to October 31st of each year for a rebate equal to no more than the municipal portion of their property tax bill for that year.
- 4.04 Organizations are limited to one funding request, per property, per calendar year.
- 4.05 Proposals will be reviewed and authorized by the Director of Community Services, or designate and reported on the Council for information purposes. However, in the event there is more demand for a program than funds, recommendations for the use of the funds will be made to Council.
- 4.06 Funds will not be expensed until the City's final tax bills have been issued.

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5.0 Milestone Special Event

- 5.01 Total funding allotment to be determined on an annual basis dependent upon applications received. The funding required for the applications which meet the criteria will form the basis of the budget development for the following calendar year.
- 5.02 Funding per Milestone Special Event will be to a maximum of \$10,000 per event.
- 5.03 Community Organizations must apply in writing to the Community Services Department prior to October 31st for events scheduled for the next calendar year.
- 5.04 Only Milestone Special Events celebrating Quarter Century (25, 50, 75, 100, etc.) anniversaries will be considered eligible to receive funding.
- 5.05 Only Milestone Special Events being planned and hosted by a not-for-profit organization will be considered eligible. Commercial/retail anniversaries are not eligible.
- 5.06 Events which are being hosted with a purpose to generate a surplus revenue are not considered eligible to receive grant funding.
- 5.07 Milestone Special Events are being hosted with the purpose of provision of a community based celebration for local residents.
- 5.08 Food, wages, gifts, and cash prizes are not considered eligible expenses.
- 5.09 The applicant must provide a detailed description of the proposed use of the funds and the funds must be used for operating purposes only.
- 5.10 All funds must be expended during the calendar year applied for or future year's applications will not be considered eligible.
- 5.11 A year-end accounting and summary of the project or initiative must be submitted to the Community Services Department by December 31st. Any event revenue deemed surplus at the time of reconciliation is to be returned to the City up to the maximum allocation of the initial grant.
- 5.12 Proposals will be reviewed and authorized by the Director of Community Services, or designate and reported on to Council for information purposes. However, in the event there is more demand for a program than funds, recommendations for the use of the funds will be made to Council.
- 5.13 Program applicants are encouraged to seek any and all alternate sources of funding but are advised that application to this program precludes application to any other source of special event funding that may be provided by the City.

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Revision History:

Proposed Date of Review:

Revision	Date	Description of changes	Requested By
0.0	April 24, 2018	Initial Release	
1.0	Aug. 9, 2016	City wide allocation, Culture maximum funding, multi year initiatives removed	Shelley Cooper
2.0	Aug. 3, 2023	Eligibility update	Shelley Cooper