

Town of Whitby

Staff Report

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Report Title: Community Development Funds – 2023 Annual Report

Report to: Committee of the Whole

Date of meeting: March 4, 2024

Report Number: CAO 06-24

Department(s) Responsible:

Office of the Chief Administrative Officer
Financial Services Department

Submitted by:

Sarah Klein, Director of Strategic Initiatives

Fuwing Wong, Commissioner, Financial Services & Treasurer

**Acknowledged by M. Gaskell,
Chief Administrative Officer**

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Sarah Klein, x4338

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1. Recommendation:

1. That Report CAO 06-24 regarding the 2023 Annual Report for the Mayor's Community Development Fund and the Performing Arts Community Development Fund be received for information; and,
2. That Council approve the updated Mayor's Community Development Fund and Performing Arts Community Development Fund Policy as shown in Attachment 4.

2. Highlights:

- The Mayor's Community Development Fund (MCDF) is financed by the Mayor and Council's Golf Tournament and Mayor's Fundraiser to support Lead and Community Grant requests. The grants support programs for community groups and individuals within Whitby, to help them undertake initiatives that benefit the community.
- In 2023, the two events increased the MCDF by \$206,502, and the MCDF provided \$189,624 in monetary grants and silent auction awards by supporting:

- four (4) Lead causes totaling \$70,000; and
- forty-five (45) Community Grants for a total value of \$119,624
- In 2023, the Performing Arts Community Development Fund (PACDF) awarded thirteen (13) grants for a total value of \$46,200.
- Recommended edits to the Mayor's Community Development Fund and Performing Arts Community Development Fund include administrative updates clarifying the cadence of lead cause applications as well as clarity on the types of organizations and applications that are not eligible for Community Development Funds.

3. Background:

The Mayor's Community Development Fund has been in place for many years. In June 2015, Council approved a Mayor's Community Development Fund Policy which established the Grants Review Committee. The Grants Review Committee consists of four members of the public appointed by Council, plus the Mayor, and is supported by a Staff Advisor. This Committee reviews applications and awards grants based on the criteria and available funds in the Mayor's Community Development Fund and the Performing Arts Community Development Fund.

The MCDF utilizes net revenue from the Mayor and Council's Golf Tournament and the Mayor's Fundraiser. Up to 50% of the proceeds raised by the Mayor and Council's Golf Tournament and Mayor's Fundraiser are awarded to Lead causes, and the balance is awarded in smaller grants up to \$5,000. Lead cause applications are due March 31 and October 31 of each year, and applications for smaller Community grants are due at the end of each month.

In May 2017, Council established the Performing Arts Community Development Fund. The PACDF utilizes net proceeds from the 2008 to 2012 Mayor's Galas and supports Whitby-based community organizations for performing arts programs, events, initiatives, and projects for up to \$5,000. Funding of up to \$25,000 may be granted for exceptional projects and initiatives. Grant applications are due at the end of each month.

Grant recipients are required to submit a final report at the conclusion of their event/project to the Grants Review Committee. This ensures accountability of funds and allows the Committee to evaluate the success of the projects.

In 2018, Council approved an automatic allocation from the Mayor's Community Development Fund of \$3,000 annually to each Legion (Brooklin Branch 152 and Whitby Branch 112). These funds are for their Remembrance Day, President's Levy, and involvement in community events and are reflected in the Mayor's Community Development Fund and Performing Arts Community Development Fund Policy. In 2022, Council approved a \$1,000 allocation to each Legion to support the replacement costs for banners for the Honour our Veterans Banner Program, which is a privately funded program. In 2023, Council approved two additional recurring grants including Mayor's Medal scholarship recipients and Lakeridge Health Foundation.

4. Discussion:

A number of updates have been recommended to F 070 – Mayor’s Community Development Fund and Performing Arts Community Development Fund Policy. These include updates to the policy regarding the timing and review of lead grant applications. Since the Mayor and Council Golf Tournament occurs in August and the Mayor’s Fundraiser takes place in September, lead grant applications are recommended to be received once a year by March 31. In addition, clarity around the types of organizations and applications the Community Funds will not support have been outlined in the Policy to provide clarity and transparency.

MCDF Lead Cause Grants (\$70,000)

In 2023, eighteen (18) Lead Cause applications were received, and four (4) Lead Cause grants were awarded for a total value of \$70,000.

The Mayor and Council’s Golf Tournament held on August 9, 2023 at Royal Ashburn Golf Club raised \$83,991 for the Mayor’s Community Development Fund. The following organizations were selected as the Lead Cause Grant recipients related to the Mayor and Council’s Golf Tournament:

- Feed the Need – \$15,000 to support a Whitby Market Food Bank with equipment and supplies
- Victim Services of Durham Region - \$15,000 to support their Teen “In Real Life” program which provides pro-active education to youth regarding victimization through an engaging and interactive program at the Safety Village

The Mayor’s Fundraiser took place on September 9, 2023 at Whitby’s waterfront, and a net revenue of \$122,511 was secured for the Mayor’s Community Development Fund. The following organizations were selected as the Lead Cause Grant recipients related to the Mayor’s Fundraiser:

- Lakeridge Health Foundation - \$25,000 to support the fundraising for Lakeridge Health’s new Hospital in Whitby or towards health care initiatives that benefit Whitby residents.
- Melly’s Place - \$15,000 to support their “A Part of Life” program, which provides adults who have an intellectual or developmental disability, with individualized training and skill building to help reach their goals

MCDF Community Grants (\$119,624)

As depicted in Attachment 1, the Committee reviewed seventy (70) community grant applications in 2023. Community grant applicants have the option of requesting a grant or a silent auction item. The silent auction items include an option of a gift basket from a local retailer or a recreation gift certificate. The following forty-five (45) grants were approved with a cumulative value of \$119,624:

- Thirty (30) of these were monetary grants totaling \$116,474; and
- Fifteen (15) were silent auction packages with a value of \$3,150. Of the silent auction items, \$544.04 were purchased in 2022 and awarded in 2023.

1. Abilities Centre (Silent Auction Item)
2. Alzheimer Society of Durham Region (\$5,000)
3. Art With A Heart (\$2,200)
4. Autism Home Base Durham (\$5,000)
5. Brooklin Whitby Girls Softball Association (Silent Auction Item)
6. Coco's Cocoa for Kids (Silent Auction Item)
7. Columbus Community Playgroup Co-operative Inc. (Silent Auction Item)
8. Community Living Ajax Pickering and Whitby (\$2,500)
9. Community Living Ajax Pickering and Whitby (Silent Auction Item)
10. Durham Region 2023 Ontario Parasport Games (\$5,000)
11. Footprints 4 Autism (\$5,000)
12. Gather For Good (\$2,500)
13. GraceWins Peer Support (\$1,000)
14. Hearth Place Cancer Centre (Silent Auction Item)
15. Hockey Helps the Homeless – 2023 Event (Silent Auction Item)
16. Hockey Helps the Homeless – 2024 Event (Silent Auction Item)
17. King Street Cooperative Community Garden (\$5,000)
18. Knights of Columbus – Event (Silent Auction Item)
19. Knights of Columbus – Fundraiser (Silent Auction Item)
20. Lake Ridge Community Support Services (\$2,500)
21. Mayor's Medal Scholarship Recipients (\$4,500)
22. Mothers Against Drunk Driving (\$4,000)
23. PARA Marine Search and Rescue (\$5,000)
24. Parkwood National Historic Site (Silent Auction Item)
25. Pride Durham (\$3,000)
26. Royal Canadian Legion - Brooklin (\$4,000)
27. Royal Canadian Legion - Whitby (\$4,000)
28. Royal Canadian Legion – Whitby (equipment) (\$5,000)
29. Scientist in School (\$5,000)
30. St Mark's United Church (\$5,000)
31. Sunrise Youth Group (\$5,000)
32. The Driftwood Theatre Group (Silent Auction Item)
33. The Salvation Army (\$5,000)
34. The Shoebox Project (\$2,500)
35. Their Opportunity (\$1,500)
36. Therapeutic Paws of Canada (\$2,500)
37. Vikings Rugby Club (Silent Auction Item)
38. VON Durham (\$2,500)
39. We Grow Food – Marigold Place (\$5,000)
40. We Grow Food – Garrard Heights (\$5,000)
41. Whitby Lawn Bowling Club (\$2,625)
42. Whitby Professional Firefighters Association (\$5,000)
43. Whitby Synchronized Skating Teams (Silent Auction Item)
44. Whitby Wolves (Silent Auction Item)
45. WindReach Farm Foundation (\$4,649)

PACDF Grants (\$46,200)

The Committee reviewed and approved thirteen (13) PACDF grant applications in 2023 totaling \$46,200:

1. Beech Street Theatre Company (\$1,500)
2. Community Concert Band of Whitby (\$1,400)
3. Durham Girls' Choir (\$2,800)
4. Durham Region International Film Festival 2023 (\$5,000)
5. Durham Region International Film Festival 2024 (\$5,000)
6. Durham Showcase Festival (\$1,500)
7. Durham Youth Orchestra (\$5,000)
8. Henry Street High School Drama (\$2,000)
9. Ormiston Public School - Musical (\$3,000)
10. St John the Evangelist - Play (\$4,000)
11. Station Gallery – Equipment (\$5,000)
12. Station Gallery – Program (\$5,000)
13. Station Gallery – Live Art Demonstration (\$5,000)

5. Financial Considerations:**Mayor's Community Development Fund:**

Following the two events in 2023 and with recommendations from the Grants Review Committee, the balance of the Mayor's Community Development Fund at the end of 2023 (to be carried over to 2024) is \$115,068.53 as shown in Attachment 2 to this report.

The 2023 events raised a total of \$206,501.77 for the Mayor's Community Development Fund (\$83,991.30 from the Mayor and Council's Golf Tournament and \$122,510.47 Mayor's Fundraiser Event). A summary of the revenues, expenditures and net proceeds for each event is provided in Attachment 3 to this report.

Recovery for Town Resources related to the 2023 Mayor's Golf Tournament (\$888.13 shown in Attachment 3) reflects recovery for Operations staff who assisted with event delivery, set-up, and take-down. Other resources and staff participation related to these events are summarized below:

- Mayor and Council's Golf Tournament: approximately 144 staff hours between the Strategic Initiatives, Communications and Creative Services, and Community Services departments, as well as staff in the Mayor's office.
- Mayor's Fundraiser Event: approximately 106 staff hours were spent by staff for the event.

The other resources and staff participation noted above are considered in-kind and not reflected in the financials for the events as provided for in Town policy.

Performing Arts Community Development Fund:

Following the recommendations from the Grants Review Committee, the balance of the Performing Arts Community Development Fund at the end of 2023 (to be carried over to 2024) is \$65,345.02, as shown in Attachment 2 to this report.

6. Communication and Public Engagement:

Opportunities for the Lead and Community Grants are advertised throughout the year utilizing the Town of Whitby website, The Whitby Perspective, and advertisements in local media and social media channels. Fund recipients are publicized on the Town of Whitby website, through social media, and media events, as applicable.

7. Input from Departments/Sources:

Departments are consulted as appropriate on relevant applications.

8. Strategic Priorities:

The Community Development Funds align with a number of actions identified in the Community Strategic Plan including Action 1.3.1 as the funds support collaboration with non-profit organizations to deliver services and programs to the community and Action 4.1.2 as the funds strengthen existing and build new partnerships. The Community Development Funds also support accessibility as there are a number of grants provided each year that promote a more inclusive and accessible community, and all of the forms are provided in an accessible format. Finally, principles of sustainability are embedded into the Community Development Funds as they promote a number of the pillars of sustainability, including supporting health & happiness, equity & local economy, and culture & community.

9. Attachments:

Attachment 1: Community Development Funds 2023 Overview

Attachment 2 : Mayor's Community Development Fund and Performing Arts Community Development Fund Continuity Schedule

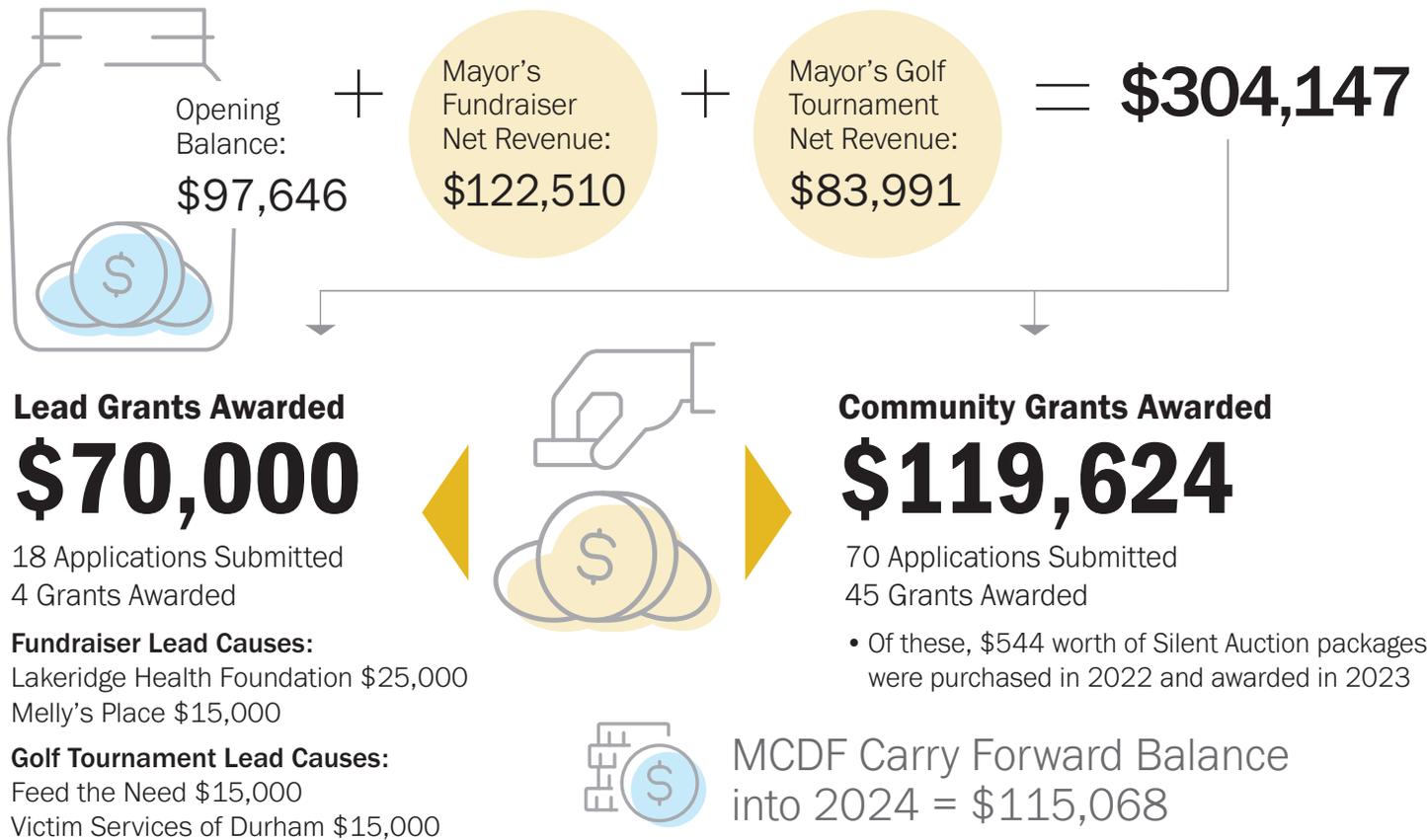
Attachment 3: 2023 Financial Summary of the Mayor's Fundraiser Event and the Mayor's Golf Tournament

Attachment 4: Draft Policy F 070 - Mayor's Community Development Fund and Performing Arts Community Development Fund

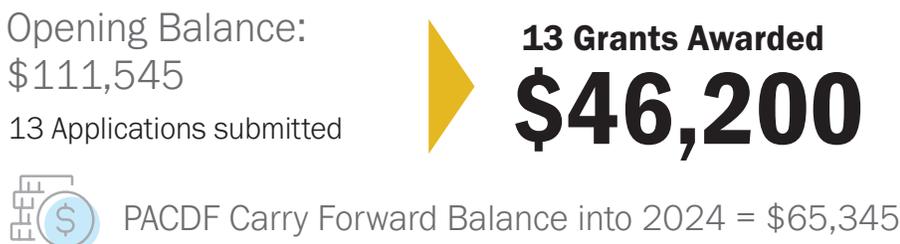
Community Development Funds

2023 Snapshot

Mayor's Community Development Fund (MCDF)



Performing Arts Community Development Fund (PACDF)



Grants Review Committee

Consists of the Mayor, four members of the public appointed by Council and a Town of Whitby Staff Advisor.



**TOWN OF WHITBY
2023 MAYOR'S COMMUNITY DEVELOPMENT FUND (MCDF)
CONTINUITY SCHEDULE**

January 1, 2023 Opening MCDF Balance (per previous report)	\$94,146.72
Adjustment related to 2022 (see Note 1)	\$3,500.00
Adjusted Opening Balance	<u>\$97,646.72</u>
Net Proceeds from 2022 Events (see Attachment 3 for details)	\$206,501.77
2023 Lead Cause Grants	-\$70,000.00
2023 Community Grants	-\$116,474.00
2023 Silent Auction Packages provided to Community Grant Applicants (see Note 2)	-\$2,605.96
December 31, 2023 - Ending MCDF Balance	<u><u>\$115,068.53</u></u>

Note 1: A payment from GemTec, in the amount of \$3,500, related to the 2022 golf tournament was received and processed after the 2022 reporting.

Note 2: \$3,150 of Silent Auction packages were distributed in 2023. Of this, \$544.04 of Silent Auction packages were purchased in 2022. The balance of 2023 Silent Auction packages distributed were carried over from 2022.

**TOWN OF WHITBY
2023 PERFORMING ARTS COMMUNITY DEVELOPMENT FUND (PACDF)
CONTINUITY SCHEDULE**

January 1, 2023 Opening PACDF Balance	\$111,545.02
2023 Grants Recommended by the Grants Review Committee	-\$46,200.00
December 31, 2023 - Ending PACDF Balance	<u><u>\$65,345.02</u></u>

**TOWN OF WHITBY
2023 FINANCIAL SUMMARY OF THE
MAYOR'S FUNDRAISER EVENT AND THE MAYOR'S GOLF TOURNAMENT**

	<u>2023 Budget</u>	<u>2023 Actuals</u>
Mayor's Fundraiser Event		
Revenues		
Event Revenues (including Sponsorship & Auction)		<u>\$299,600.00</u>
Total Revenues	\$100,000	\$299,600.00
Expenditures		
Facility Rental		\$34,274.40
Event Costs		\$138,168.77
Signage/Communications		<u>\$4,646.36</u>
Total Expenditures	\$50,000	\$177,089.53
Net Proceeds of the Mayor's Fundraiser Event	<u>\$50,000</u>	<u>\$122,510.47</u>
Mayor's Golf Tournament		
Revenues	\$100,000	\$151,391.59
Expenditures		
Facility Rental		\$58,334.73
Event Costs		\$5,448.62
Signage/Communications		\$2,728.81
Recovery of Town Resources		<u>\$888.13</u>
Total Expenditures	\$40,000	\$67,400.29
Net Proceeds of the Mayor's Golf Tournament	<u>\$60,000</u>	<u>\$83,991.30</u>
Total Proceeds - Contribution to MCDF	<u>\$110,000</u>	<u>\$206,501.77</u>



Town of Whitby Policy

Policy Title:	Mayor's Community Development Fund and Performing Arts Community Development Fund - DRAFT
Policy Number:	F 070
Reference:	Council Resolution #336-15 and #69-16 and #37-22 and #74-23
Date Originated:	June 29, 2015
Date Revised:	March 20, 2023
Review Date:	As required
Approval:	Council
Point of Contact:	Director Strategic Initiatives

Policy Statement

The Mayor's Community Development Fund and Performing Arts Community Development Fund provide financial assistance for community groups within Whitby to help them undertake initiatives that will benefit the community.

Purpose

To ensure the proceeds from the Mayor's Community Development Fund and Performing Arts Community Development Fund are allocated in a fair and transparent manner to community based organizations.

Scope

This policy applies to organizations applying for community grants from the Mayor's Community Development Fund and Performing Arts Community Development Fund.

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1 Definitions

- 1.1 **Annual Report** means an annual report submitted to Council identifying the use of the funds, the number of applicants, who receive funding in any one year and the benefit to the community from the grants. It will also identify any suggestions for changes in the process that Council should consider.
- 1.2 **Criteria** is used to evaluate grant applications and make recommendations for grant eligibility based on how the project will benefit the community (scale, inclusivity, direct and indirect benefits), soundness of business plan (including resources, own funds and fundraising), the importance of the Town's contribution, and how the success of the project will be determined.
- 1.3 **MCDF Lead Grants** are causes or organizations identified as the primary beneficiary of the Mayor and Council's Golf Tournament and Mayor's Fundraiser through grant funding of up to 50% of the funds raised to support a major community initiative (capital or program) benefiting the community.
- 1.4 **MCDF Community Grants** are eligible grants of up to \$5,000 to support community groups for specific initiatives that promote inclusiveness and a broad community benefit through:
- Capital initiatives benefiting the community;
 - Community special events; and,
 - Funding for initiatives or programs.

An applicant may apply more than once for a grant.

- 1.5 **PACDF Community Grants** are eligible grants of up to \$5,000 to support performing arts in Whitby. Grants can be provided to performing arts groups, organizations for programs, events, initiatives and projects, including capital projects. An applicant may apply more than once for a grant. On special circumstances a grant may be provided up to \$25,000.
- 1.6 **Grants Review Committee** is an independent committee of Council, operating and appointed in accordance with its Council approved Terms of Reference, and delegated authority to review and award Grants in accordance with this policy.
- 1.7 **Mayor's Community Development Fund** is a reserve established from the net proceeds raised from the Mayor and Council's Golf Tournament, Mayor's Fundraiser or other external revenue sources.

- 1.8 Performing Arts Community Development Fund** is a Town reserve consisting of the net proceeds from the 2008-2012 Mayor's Galas to support performing arts programs, events, initiatives, and projects in Whitby. Additional funds may be allocated towards the Performing Arts Community Development Fund at Council's direction.

2 Responsibilities

- 2.1** Council shall approve members of the Grants Review Committee and consider recommendations for changes to the grant process as submitted by the Grants Review Committee.
- 2.2** Strategic Initiatives Division to promote Grant opportunities in coordination with the Communications and Creative Services Division.
- 2.3** The Grants Review Committee will review applications and award grants based on the grant criteria and available funds in the Mayor's Community Development Fund and Performing Arts Community Development Fund. All decisions of the Grants Review Committee will be final. The Grants Review Committee shall submit an annual report to Council.

3 Policy Requirements

- 3.1 Mayor's Community Development Fund Grants**
- a) The Mayor's Community Development Fund utilizes funding from the net proceeds from the Mayor and Council's Golf Tournament and Mayor's Fundraiser.
 - b) The Mayor's Community Development Fund supports lead causes or charities plus provides funding for initiatives benefiting the Whitby community, capital projects, and community events.
 - c) The Mayor's Community Development Fund provides an ongoing annual grant of \$4,000 to the Brooklin Royal Canadian Legion Branch 152 and \$4,000 to the Whitby Royal Canadian Legion Branch 112 to support community events in the amount of \$3,000 including their New Year's Levies and Remembrance Day Ceremonies as approved through Council resolution #16-18 and \$1,000 for the replacement of banners through the Honour our Veterans Banner Program.
 - d) The Mayor's Community Development Fund provides annual funding to the Mayor's Medal scholarship recipients in an amount to be agreed upon by the Grants Review Committee.

- e) Lead Grants provide an opportunity for community agencies that require substantial funding for an initiative providing broad community benefit to Whitby and/or providing a benefit that may extend beyond the borders of Whitby.
- f) A minimum of two Lead Grants will be selected annually. One Lead Grant will be eligible for up to 50% of the funds raised by the Mayor and Council's Golf Tournament and the other Lead Grant will be eligible for up to 50% of the funds raised by the Mayor's Fundraiser. An annual Lead Grant will be provided to Lakeridge Health for their capital campaign with the amount to be determined annually by the Grants Review Committee. Additional Lead Grants may be selected at the discretion of the Grants Review Committee based on eligible funds available.
- g) Lead Grant Applications will be received once a year and will be communicated through Town of Whitby channels.
- h) The Lead Grants will be communicated as part of the Mayor and Council's Golf Tournament and Mayor's Fundraiser so that the public and participants understand what organizations benefit from a significant portion of the funds raised during the events.
- i) The remaining funds will be used to provide Community Grants of up to \$5,000 to eligible applicants as determined by the Grants Review Committee.

3.2 Performing Arts Community Development Fund Grants

- a) The Mayor will be excluded from discussions related to PACDF Community Grants.
- b) The Performing Arts Community Development Fund utilizes net proceeds from the 2008 – 2012 Mayor's Galas.
- c) The Performing Arts Community Development Fund supports Whitby based community groups, organizations with a presence in Whitby and residents for performing arts programs, events, initiatives and projects.
- d) Funding up to \$5,000 will be available to eligible applicants as determined by the Grants Review Committee.
- e) Funding may be available for exceptional performing arts programs, events, projects or initiatives, including capital, up to \$25,000 to eligible applicants as determined by the Grants Review Committee.

- f) Once the available funds in the Performing Arts Community Development Fund are fully dispersed, grant applications will no longer be received.

3.3 Eligible Grant Recipients

- a) Whitby based community groups and not for profit organizations with a presence in Whitby.
- b) Organizations already receiving funding from the Town of Whitby for a specific purpose may be eligible for community grant funding for the same purpose, but given low priority.
- c) Groups receiving funding from the Town of Whitby can qualify to access Grants for other initiatives not already funded by the Town based on the relative merit of the initiative.
- d) Funding towards operating expenses of a community organization or charity are given low priority.
- e) Funding for sports groups or organizations are given low priority.

3.4 In-Eligible Applicants

The following organizations are not eligible for grant funding:

- a) For profit organizations.
- b) Religious organizations for religious purposes.
- c) Political parties;
- d) Organizations engaged in political activity supporting or opposing any political party, or political campaign;
- e) The intent of the organization is contrary to Town policies, by-laws, the Ontario Human Rights Code or current legislation;
- f) Organizations whose purpose or activities are for the purposes of bringing about change in law or government policy.

3.5 Applications

- a) The Mayor's Community Development Fund and Performing Arts Community Development Fund support innovative projects and initiatives that provide direct and indirect benefit to Whitby residents.

- b) Organizations seeking financial assistance must submit an application to the Town of Whitby as outlined in the Mayor's Community Development Fund and Performing Arts Community Development Fund Procedure.
- c) The Grant application process and evaluating criteria shall be followed in accordance with the Mayor's Community Development Fund and Performing Arts Community Development Fund Procedure.

3.6 Reporting and Transparency

- a) The annual report submitted by the Grants Review Committee shall include the number and nature of applicants, the distribution of funds, who received funding in any one year and the purpose of the grant.
- b) It will also identify any suggestions for changes in the process that Council should consider. Any changes would require Council approval.
- c) The annual report will be published on the Town's website each year.
- d) Unused amounts in the Mayor's Community Development Fund and the Performing Arts Community Development Fund at the end of each year will be carried over to the next year.

This Policy is hereby approved by Council Resolution #74-23 on this 18th day of March, 2024.