

DISTRICT OF METCHOSIN

**SUBJECT: FINANCE
Grants-In-Aid**

SECTION: F-100

POLICY: F-100.04

COUNCIL: Nov 25, 2024

AMENDS:

1. POLICY OBJECTIVE:

The District of Metchosin recognizes the vital role non-profit and charitable organizations play in ensuring the social, cultural, and environmental well-being of our community. The District of Metchosin Grants-in-Aid funding program provides financial assistance to community organizations to support programs, projects, services, and events that benefit the citizens of Metchosin. This policy guides the administration and delivery of the Grants-in-Aid funding program.

2. POLICY PRINCIPLES:

- a) Establish a transparent and consistent process for inviting, receiving and evaluating requests for grants.
- b) Provide criteria to be applied in evaluating requests for grants.
- c) Complement or extend the reach of the District of Metchosin's programs and services.
- d) Encourage and support civic engagement and volunteerism.
- e) Enhance the quality of life for the residents of the District of Metchosin.
- f) Addresses barriers to participation in programs and services for people with disabilities, underrepresented or at-risk groups.
- g) Not available for annual operating expenses or capital improvements to rented/lease premises.
- h) Only registered non-profit or charitable organizations will be eligible for grants-in-aid.

3. GRANT CATEGORIES:

There are two categories for Grants-in-Aid:

A. Capital Grants-in-Aid

- a) Capital Project grants are available to community groups to assist with capital equipment and improvements to organization or District owned buildings. Grants are distributed based on applications received and determined need.
- b) Applicants are encouraged to seek all potential sources of funding and not to rely or become solely dependent upon District funding for capital improvements. Priority may be given to projects with multiple funding sources or where the District is not the sole funding source.

Capital Grants-in-Aid must:

- a) Be to a Registered organization with proof of registration and is responsible for operating a District-owned building or asset.
- b) Use grant funds for capital improvement costs;
- c) Identify all funding sources including any grants received or requested for the same purpose.
- d) Provide a copy of the organization's most recent financial statements;
- e) Provide a project budget which includes capital costs and ongoing operating costs associated with the project and how they will be funded;
- f) Provide a current and next year capital improvement plan with costs and funding sources;
- g) Use a competitive quote or bidding process when required by the District to do so;
- h) Have all volunteer or in-kind labour supervised or performed by a contractor;
- i) Any advertising for the group must indicate that funding was received from the District of Metchosin;
- j) Within 90 days of completion of the project, provide:
 - i. A report outlining key performance data relative to the project;
 - ii. A report outlining the project's financial performance relative to budget;
 - iii. A declaration from an authorized signatory that funds were used as per the application;
 - iv. Electronic copies of all receipts;
 - v. Return any unused funds to the District.

Eligibility is based on:

- a) A non-profit organization in good standing with the Societies Act and/or a registered charitable organization in good standing with the Canada Revenue Agency.
- b) Requesting funds for capital improvement and maintenance for an organization or District-owned building, land or asset.

B. One-time Grants-in-Aid

- a) One-time Grants-in-aid are funding for a program, short-term undertaking with a completion date or an event with a start and finish date (May be an annual event). Programs or events must be within District boundaries, be open to the public or specified group and have a reasonable price of admission.
- b) One-time Grants-in-Aid do not include Fee Waivers or capital projects as set out under this Policy.

Applications for One-Time Grants-in-Aid must:

- a) Include a written application;
- b) Provide a budget;
- c) Ensure the residents, projects or facilities of Metchosin are the primary beneficiaries of any approved funding.

Applications for One-Time grants-in-aid over \$1,000 must meet the requirements:

- a) Be a non-profit organization in good standing with the Societies Act and/or a registered charitable organization in good standing with the Canada Revenue Agency;

- b) Provide a copy of the organization's most recent financial statements;
- c) Provide a copy of the organization's approved budget;
- d) A certificate of insurance (if applicable);
- e) Indicate any grants received or requested for the same purpose;
- f) Indicate if a permissive tax exemption has been received from the District;
- g) Any advertising for the program/event must indicate that it was sponsored by the District of Metchosin.
- h) Within 90 days of the event provide:
 - i. A report outlining key performance data of the event;
 - ii. A report outlining the event's financial performance relative to budget;
 - iii. A declaration from an authorized signatory that funds were used as per the application;
 - iv. An evaluation of how the event benefited Metchosin projects, residents and/or facilities.

Eligibility is based on:

- a) A non-profit society in good standing with the Societies Act and/or a registered charitable organization in good standing with the Canada Revenue Agency.
- b) Requesting funds for a program, short-term undertaking with a completion date or an event with a start and finish date (may be an annual event). Programs or events must be within District boundaries, be open to the public and have free or nominal admission.

4. DEFINITIONS:

Capital Costs are fixed one-time expenses incurred on or for physical assets or the equipment used in the rendering of services generally with a cost over \$5,000.

Community Group includes voluntary groups, neighbourhood associations, service clubs or other groups of individuals that are not registered with BC Corporate Registry and operate with no constitution or bylaws or any paid staff.

In-kind Services means the provision of service for no cost, including labour or equipment but not rental fee waivers. In-kind services will not be considered a reimbursable expense.

Local means operating within the municipal boundaries of the District of Metchosin or in the case of a group or organization, 60% or more of the members or participants or beneficiaries are residents of the District.

Registered Organization includes an organization, a society, a non-profit or not-for-profit organization, an association, a registered charity, a cooperative or other group, either incorporated or unincorporated, registered with the BC Corporate Registry.

Registered Charity means charitable organizations, public foundations, or private foundations that are created and resident in Canada.

Non-profit or not-for-profit organizations means associations, clubs, or societies that are not charities and are organized and operated exclusively for any other purpose except profit.

Society or Societies includes non-profit or not-for-profit corporations or organizations and means a group that is formed for any lawful purpose or purposes. A society must not have, as one of its

purposes, the carrying on of a business for profit or gain but carrying on a business to advance or support the purposes of a society is not prohibited.

5. REVIEW PROCESS, REQUIREMENTS & PROCEDURES:

<p>Eligibility</p> <p>Application must:</p> <ol style="list-style-type: none"> 1. Be made by a service club, non-profit society or charitable organization whose services benefit the residents of Metchosin and help meet the goals and strategic initiatives of the District; 2. Provide a worthwhile service(s), program(s), or amenity to the Metchosin community and does not duplicate or compete with existing services or facilities; 3. Demonstrate alignment with relevant District guiding strategies (e.g. Official Community Plan, District Strategic Plan,) 4. Demonstrate that every effort has been made to earn or acquire funding from other sources prior to applying for a municipal grant 5. Show an appropriate grant governance structure, including the ability to produce a total and full accounting of present funding and up-to-date financial statements in order to demonstrate past and present handling of funds.
<p>Ineligibility</p> <p>Applications will be rejected if:</p> <ol style="list-style-type: none"> 1. The organization is applying for funds to cover previous years' operations or capital deficits 2. The applicant has received funds in the previous year but has not submitted any or all of the required accountability documents (Including but not limited to: an annual report, financial statements etc.) 3. The applicant is in arrears on property taxes or fees due to the District; 4. The applicant is providing assistance or competing with a business; 5. The applicant has operated in contravention to any section of a previous Service/Funding/Operating Agreement with the District; 6. The applicant must demonstrate a financial need for a specific program or project (Grants will not be given for the sole purpose of building reserves).
<p>Administrative Procedures</p> <ul style="list-style-type: none"> • The total of all grants authorized in any one year shall not exceed the approved budgetary provision. • Best practice would limit the approved grants at the original deadline to 75% of the approved budget to allow for mid-year grants. • All applications must be submitted on the provided application form and include all of the information that is identified in the application information requested section. • Initial or new applications under the Community Grant Funding program must be submitted by March 30th of a given year. • Council reserves the right to provide grant funding to special projects throughout the fiscal year provided sufficient budget remains. • Staff will report to Council on the requests made and for each application, shall provide Council with an overview of total District support (across programs, capital investment and services) to the applicant to provide better context for decision making. • Applicants may be required to make a presentation to Council to provide additional information on their project. • All applicants will have to provide a written report to Council that outlines the success of their activity and how their funds were used.

- The Finance Committee will review and evaluate all applications.
- Final approval on all applications will be confirmed by resolution of the Council at a Regular open Council meeting; successful applicants will be notified.

6. EVALUATION CRITERIA:

EVALUATION CRITERIA		
MEETS ALL ELIGIBILITY CRITERIA FOR FUNDING STREAM		(Y/N)
Program/Project Quality & Merit (30 points – maximum of 5 points each)	SCORE	
		Evidence of financial need, and need for the activity, project or proposal
		Alignment with municipal objectives
		Complements or extends municipal services
		Addresses barriers to services for people with disabilities, underrepresented or at-risk groups
		Amount of funding requested related to number of residents served
		Clear articulation of the degree to which the activity, project or proposal supports the mandate and objective of the organization
Organizational Effectiveness & Capacity (30 points – maximum 5 points each)		Clear mandate and competent administration
		Financial stability and accountability as demonstrated by prior financial performance
		Realistic, balanced budgets and timelines
		Diversified sources of revenue/ability to leverage the District’s investment
		Demonstrated track record of community service
		Ongoing organizational capacity and proven ability to carry out the proposal
Community Engagement & Impact (40 points – maximum of 8 points each)		Level of public access and participation within the municipality
		Number of volunteers in the organization
		Growing interest and attendance within organization
		Level of engagement and cooperation with other community groups
		Demonstrated support from the community as evidenced by collaborations, partnerships and in-kind support
		Total (maximum 100 points)