

## **POLICY**

### **ELECTORAL AREA GRANT-IN-AID FUNDING**

#### **PURPOSE AND INTENT**

The Electoral Areas of the Columbia Shuswap Regional District provide Grant-in-aid funding in order to assist non-profit societies/organizations and registered charitable organizations that provide community or regional benefit and enrichment to enhance the quality of life for residents.

This policy is intended to provide a process to enable the Electoral Area Directors to make fair and equitable recommendations to the CSR Board on behalf of their respective areas in the granting of funds to the community. The goal of this policy is to establish open, transparent, consistent, and accountable guidelines for the evaluation and distribution of Electoral Areas' Grant-in-aid funds, respecting the limited financial resources available for this purpose. The maximum budget allocation for the Grant-in-aid funds is established within the Local Government Act and is subject to lesser amounts at the discretion of the Electoral Area Director.

Not all societies or organizations meeting the basic criteria will automatically receive a grant, funding is not guaranteed from year to year, and organizations are encouraged to work towards financial independence.

#### **POLICY**

Requests for Grant-in-aid funds must meet all requirements of the *Local Government Act* and be approved by the CSR Board of Directors either in the form of a line item in an adopted Five Year Financial Plan or through a separate resolution.

#### **1. The Process:**

- Grant-in-aid applications must be submitted to the Manager, Financial Services or Designate by the 1<sup>st</sup> day of the month in order to be considered for that month's Board meeting, with the exception of December, in which case, applications must be received by November 20<sup>th</sup>.
- The Manager, Financial Services or Designate will forward all complete and eligible applications to the Electoral Area Director for support.
- Supported applications go to the monthly Board meeting for approval of a Grant-in-aid resolution by the entire CSR Board, providing adequate funds remain within the current Five Year Financial Plan.
- Un-supported applications will receive correspondence from the Manager, Financial Services or Designate advising of the lack of support.
- Recipient organizations who have been approved for funding will receive a cheque and congratulatory letter within 4 weeks of the date the application was approved by the Board.

## **2. Criteria:**

- The Grant-in-aid request for funds must be within the current year's budgeted allocation.
- The application must show a demonstrated need for the service/project within the community and the financial need of the Recipient organization.
- The Grant-in-aid request for funds will not be used for purposes that are the responsibility of senior levels of government, as this would represent a downloading of senior government costs to local residents.
- Grant-in-aid funds will not be provided for:
  - Personal benefit, individual, industrial, commercial or business undertakings;
  - Religious organizations serving primarily their membership and/or their direct religious purpose;
  - Ethno cultural organizations serving primarily their membership and/or their own ethnic promotion;
  - Annual fundraising campaigns;
  - Endowment funds;
  - Debt retirement, interest payments or accumulating reserves;
  - Purposes for which the Board identifies as potentially exposing the CSRD to risk of an unacceptable liability.

## **3. Recipient Organization must:**

- Have a contact representative within the Regional District.
- Provide a benefit to persons residing within the Regional District.
- Be non-partisan, non-denominational and non-profit.
- Have a bank account in the society/organizations' name.
- The organization must extend its service to the general public and shall not exclude anyone by reason of religion, ethnicity, gender, age, sexual orientation, language, disability, or income, except in instances where it can be proven that the exclusion of some groups is required for effective service delivery to the target group.
- Applicants are generally required to provide a local component of funding, either through fundraising, membership, donation or work-in-kind.
- Preference of Grant-in-aid funding will be given to the following:
  - Applications that demonstrate a significant benefit to a large segment of the Electoral Area,
  - Organizations that have a demonstrated financial need,
  - Organizations that seek funding from a variety of sources,
  - Applications that promote volunteer participation and citizen involvement,
  - Exercise co-ordination, co-operation and collaboration with other groups to prevent duplication of projects, programs, services or special events.

#### **4. Documentation to include:**

The Grant-in-aid application must be fully complete, provide sufficient documentation to justify the Grant-in-aid, and include:

- Details on how the organization contributes to the general interests and advantage of the Electoral Areas. Those applications that have a measurable benefit to the communities outside the Electoral Areas must provide details of the benefit.
- A statement of purpose of the organization and purpose for which the grant funding is being requested.
- If the organization is an association or society, a list of the current officers and directors.
- A budget for the project, program, event or services.
- Information on what all sources of funding have been sought and received.
- If the funding request is greater than \$2,000, an Income Statement (profit and loss) for the most recent fiscal year end, a Balance sheet for the most current fiscal year end and a comprehensive budget for the current year activities of the applicant. These documents may be requested by the Board, the Area Director or the Manager of Financial Services for any grant-in-aid application. This policy makes no provisions for audited financial statements
- A statement on how the recipient organizations' plans to acknowledge the Grant-in-aid funds contributed by the CSRD (see other information below).

#### **5. Post-application documentation and certification**

Grant-in-aid funds are not to be utilized for any purpose other than that which is identified in the Grant-in-aid application. Approved Grant-in-aid applications receiving funding in excess of \$2,000 must provide the following documentation within the earlier of: 1 year of the payment of the Grant-in-aid by the CSRD to the recipient organization, upon completion of the project or upon a subsequent grant application:

- Copies of the paid invoice(s) where applicable,
- Financial Statements for the fiscal year in which the funds were spent,
- Photographs of project where applicable,
- Letter of certification, signed by the authorized signatory for the recipient organization that the grant-in-aid was utilized for the purpose for which the funds were sought.

If the project is not complete within one year of receipt of the Grant-in-aid, an extension letter must be provided to the CSRD indicating why the project has been delayed and the new timeline for the project.

Unspent Grant-in-aid funds must be returned to the CSRD. Failure to comply with the documentation and certification requirements will render the recipient organization ineligible to receive further Grant-in-aid funds.

## **6. Other information**

The Columbia Shuswap Regional District is subject to Provincial Freedom of Information and Privacy and Protection Act and cannot guarantee the information provided can or will be held in confidence.

Approved recipients must acknowledge the CSRD as a sponsor in any program publications or marketing, however, the project, program, service or special event cannot be represented as a project, program, service or special event of the CSRD nor may the recipient organization hold itself out as an agent of the CSRD in any way. Organizations that wish to acknowledge the CSRD by using the CSRD logo, must submit a request at <https://www.csr.bc.ca/inside-csr/stay-connected/logo-request-form>

No Grant-in-aid applications will go before the Board for approval in the three (3) regular Board Meetings prior to a local government election. In the event of a by-election, only those grant-in-aid applications applicable to the Electoral Area will be suspended until after the by-election.

It should be noted that the Electoral Areas' Grant-in-Aid process is very competitive and applicants should submit the best and most complete applications possible.

May 1991  
July 1999  
August 21, 2014  
June 16, 2016  
June 20, 2019