



qathet

REGIONAL DISTRICT

SECTION 3	FINANCIAL POLICIES
POLICY	3.11
SUBJECT	FINANCIAL ASSISTANCE
ADOPTED	JULY 25, 2013
AMENDED	FEBRUARY 27, 2020; JUNE 28, 2022; JUNE 26, 2024

POLICY STATEMENT:

The qathet Regional District (qRD) supports the enhancement of a positive quality of life for all of its residents and one means of helping to achieve this goal is through financial assistance programs. Building on the pillars of sustainability: economic, environmental, cultural and social; applications will be considered for initiatives that offer programs and facilities that are utilized, frequented or patronized by residents of the qathet region inclusive of electoral areas A, B, C, D, E, City of Powell River and Tla'amin.

The funding from the qRD may be used to kick start initiatives with seed funding, support capital projects to construct new, or to upgrade, repair, renovate or otherwise improve existing community indoor or outdoor public-use facilities. Funding can be used to promote or foster economic activity or provide for social well-being of the residents of the qathet region. It can also be used to help to match funding obtained through Provincial and / or Federal programs.

PURPOSE:

To establish guidelines for the consideration of requests for financial assistance.

PROJECT CRITERIA:

Projects must involve or benefit a significant segment of the electoral area or region and can include:

- **Projects**
One time only projects that will help or respond to health, social and cultural needs within the qathet regional district may be eligible for a grant. The project must have a specific set of goals and objectives, and have a defined start and finish date.

- **Programs and Services**

Ongoing programs and services which contribute to the health and social well-being of qRD residents may be eligible for a grant.

- **Events**

Special events that enhance and contribute to the qathet regional district's cultural life and promote community involvement and spirit may be eligible for a grant. The events must have a defined start and finish date, but may also be held annually.

Applications involving land and/or facilities under the direction or ownership of a local government **must** include from the local government a letter of support for the initiative.

The qathet Regional District (qRD) supports the enhancement of a positive quality of life for all of its residents and one means of helping to achieve this goal is through a grant in aid funding program which supports the pillars of sustainability as outlined in the qathet Regional District's Strategic Plan. The qRD strives to support initiatives that enhance environmental, cultural, social and economic sustainability in the region, and these include but are not limited to initiatives that:

- Support the enhancement of a positive quality of life for residents of the qathet region;
- Develop skills, knowledge and experience for members of the community;
- Support the community's well-being;
- Provide measurable arts and cultural benefits for residents and communities within the qathet region;
- Provide recreational opportunities for residents of the qathet region;
- Provide improvements to the environmental quality within the qathet region;
- Create economic benefits such as generating local spending and creating employment opportunities;
- Bring new money into the qathet region from outside sources;
- Support the community's long-term well-being;
- Provide measurable economic benefits for residents and communities within the qathet region;
- Enhance social cohesion;
- Address the root causes and effects of poverty;
- Contribute to the vitality and livability of our community;
- Foster social inclusion;
- Foster social equity;
- Reduce social, economic or physical disadvantage of residents;
- Support a broad spectrum of community needs and interests.

The qRD Board may, at its discretion, award grants to groups which offer a service deemed of value to the qathet region, or to community committees, whose mandate is to function for the good of the qathet region and its residents.

ELIGIBLE APPLICANTS:

Eligible applicants include:

- Not-for-profit or charitable organizations that are actively registered with the *Societies Act* or incorporated, and in good standing with Revenue Canada;
- Organizations affiliated with a community or provincial organization in the subsection above;
- Well established community groups that offer projects, programs, services or events which have a demonstrated need in the community and which provide benefits to qRD residents;
- Other agencies or projects so determined by the Board of the qRD.

EXCLUSIONS FROM ELIGIBILITY:

The following are specifically excluded from funding under the qRD's financial assistance program:

- Applications from individuals;
- Educational institutions (e.g. schools, universities, colleges);
- Religious organizations that serve primarily their membership and / or their direct religious purposes;
- Applications from charitable organizations whose services are not delivered directly to residents of the qRD region.
- Private invitation only events.
- Activities of ethno-cultural organizations that serve primarily their membership and/ or their specific ethnic promotion;
- Hospitals and health care facilities;
- Annual fund-raising campaigns, from letter requests or telephone campaigns;
- Aid to endowment funds;
- Debt retirement, interest payments or reserves;
- "For-profit" commercial ventures or private organizations;
- The cost of developing a proposal;
- Conducting studies to assess an existing facility and its suitability to accommodate changes or to help assess the need for a new facility or expansion/upgrading of an existing facility;
- Other agencies or projects so determined by the qRD Board.

PROCESS:

Applications must include all documentation requested in the application form and must be submitted to the finance department of the qRD. Not all organizations meeting the basic criteria will automatically receive a grant. Approval of a grant by the qRD one year does not ensure that grant requests in a subsequent year will be successful.

Application deadlines:

- First intake – March 31.
- Second intake – August 31.

Completed applications will be considered by a Financial Assistance Advisory Committee and recommendations will be forwarded to the qRD Board for approval. You will be notified in writing whether your application was or was not successful according to the following timelines:

- First intake – you will be notified by July 31 and the grant will be paid out in August.
- Second intake – you will be notified by November 30 and the grant will be paid out in December.

If your organization requires the funds prior to August or December the request to release the funds early must be submitted in writing along with the application. The qRD does not guarantee that an early funding request will receive approval.

When applications are presented to the Board for consideration staff will provide the Board with a summary of grants awarded over the most recently completed ten year period. The summary shall include a summary of which participating areas are considered to have benefitted from each initiative, as well as the contribution from each participating area to the service. The Board may use this information to regionally balance benefits over time among the collection of projects supported.

GRANT CALCULATIONS/CONDITIONS:

Due to limited funds, not all applications meeting the funding criteria will obtain grant approval. The Board may award a grant that is less than the amount applied for by the applicant.

Applications to the first intake may be awarded all of the available grant funding; applications to the second intake will be considered from any funding not awarded to the first intake of applicants.

Applicants should demonstrate that they have applied for other funding opportunities through the appropriate Provincial/Federal Program(s) or reasons why not.

Applicants should demonstrate that they have applied for funding from other local governments.

Applicants generally will be required to provide a local component of funding, either through fund raising, donations, work-in-kind,, or corporate support, or if they have received grants-in-kind, to indicate the value.

The contribution from the Regional District will not normally exceed 25% of the total project. The Board may, at its sole discretion, override the previously noted guideline.

Applicants must demonstrate how their projects will be sustained and supported following receipt of the funding.

The qRD Board may refuse funding of any application.

The decision of the qRD Board on any grant is final.

USE OF THE GRANT:

A grant recipient must use the grant only for the purpose of which the application was approved. Any alteration in this purpose must be approved in writing by the qRD Board.

A recipient who does not use the funds for the purpose for which it was awarded will have to repay the grant as a debt due and owing to the qRD.

Unused portions of the grant must be returned to the qRD.

The qRD Board or their authorized representatives, may request additional information (e.g. books and records, financial statements, progress reports, permits, construction documents, on-site inspections, audited statements or other relevant information) to determine whether the funds were expended in accordance with the conditions upon which they were granted.

FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY ACT:

The information collected to support your application is for the use of the Board of the qRD in assessing your grant request. The information will be used for the administration of the qRD Financial Assistance Program, which is coordinated by the qRD. Information provided will be made available to the general public through Board meeting agendas and published on the qRD website. The information may also be shared with other government departments / agencies with interests in the initiative for which application is being made. The information will not be disclosed to any other third parties except as allowed by the Freedom of Information and Protection of Privacy Act.



GRANT APPLICATION – GUIDELINES

A. REQUIRED DOCUMENTATION

The following documents are required:

- (a) A list of your Board of Directors, Officers and Executive Directors (if applicable).
- (b) A copy of the organization's current registration documents, indicating that it is in good standing (if applicable).
- (c) Your latest financial statements endorsed by two signing officers of the Board of Directors.
- (d) A budget for the year in which the grant is requested. ***(This may be the budget for your organization, or, if you are requesting funding for a specific project, submit the project budget only).***
- (e) Short description of the purposes of your organization

B. INITIATIVE AND FINANCIAL INFORMATION

Nature of Initiative Identify the event or outcome of work to be carried out (i.e. a detailed description of the initiative, what is going to transpire or happen).

Estimated Total Initiative Cost An initiative budget must be submitted which summarizes the estimated costs of the initiative.

Grant Request Indicate the amount of funding requested from the qRD.

Other Revenue List the other sources of revenue for the initiative including the amount of actual cash your organization will contribute to the initiative.

C. DEADLINE

There will be two annual application intakes:

- First Intake March 31
- Second Intake August 31

Organizations will be notified each year, in writing, whether or not their grant application has been successful.

Applications should be addressed to:

Assistant Manager of Financial Services
qathet Regional District
202 – 4675 Marine Avenue
Powell River, BC V8A 2L2



APPLICATION FOR FINANCIAL ASSISTANCE

ORGANIZATION

Legal Name: _____

Address:

E-mail: _____

Registration Number (Societies Act): _____

CRA Business Number (Registered Charities): _____

Contact Person: _____

Address:

Phone: Business _____ Home _____ Fax _____

ORGANIZATION PROFILE

Mission / Purpose Statement (or attach a copy):

Description of Clientele:

Number of Clients Served Annually: _____ Number of Volunteers: _____

Primary Geographic Region Served: _____

Registration Documents: Attach a copy of your organization's current registration document, indicating that it is in good standing.

List of Executives: Attach a separate page listing names, positions and addresses of all of your current executive and/or board of directors, including names, titles, address and home/work phone numbers.

Budget: Attach a complete budget for your specific project / event. The budget should show the amount of revenue received from user fees, fund raising activities, membership fees, other government funding, etc.

Financial Statements: Attach a copy of your most recent financial statements, signed by two directors.

GRANT INFORMATION

Nature of Initiative:

Initiative Start Date: _____

Initiative Completion Date: _____

Grant requested is for (check all applicable)

- | | |
|---|---|
| <input type="checkbox"/> General Operating Assistance | <input type="checkbox"/> Specific Project |
| <input type="checkbox"/> Capital | <input type="checkbox"/> Special Event |

Facility: If the initiative is for capital or renovation project please provide:

Name of Facility: _____

Street Address or Legal Description:

Registered Holder of Land Title (Provide Documentation):

Facility Operator/Leaseholder:

Describe your initiative.

Describe how the grant funds will be used.

Provide a list of key dates and milestones for the project:

Which area does your initiative benefit?

- Electoral Area A (north from City boundary)
- Electoral Area B (south from City boundary)
- Electoral Area C (from Whalen Road to Jervis Inlet)
- Electoral Area D (Texada Island)
- Electoral Area E (Lasqueti Island)
- City of Powell River
- Tla'amin Nation

How will your initiative benefit the community?

Has or does your organization intend to submit an application for financial assistance to the City of Powell River?

- Yes No

How much funding are you applying for from the City of Powell River? _____

How will you evaluate the success of your service/project? (Describe in detail).

Total Project Budget: _____

Funding Requested from the qRD _____

INITIATIVE / PROJECT BUDGET:

Please give details of revenue and expense projections.

REVENUE (Please state source)			EXPENSES (Please itemize)	
Description	Amount		Description	Amount
SECURED FUNDS				
Secured Funds In-kind				
SECURED FUNDS SUBTOTAL				
ANTICIPATED FUNDS				
Funding Requested from qRD				
ANTICIPATED FUNDS SUBTOTAL				
Volunteer Labour (estimated value)				
TOTAL FUNDING			TOTAL EXPENDITURES	

Definitions:

Secured funds: money that is currently available for the project

Secured funds in-kind: value of in-kind grants secured for the project to date

Anticipated funds: sales, grants and donations that are expected to provide money for the project. Please describe grants as cash or in-kind.

Expenses: include service provider quotes, if applicable.

Volunteer labour: should be directly related to the initiative for which funding is being requested.

SIGNATURES:

Signature of Applicant or Authorized Representative

Print Name and Title

Date

APPLICATION CHECKLIST:

- A completed and signed application form.

Attachments:

- Organization's current registration documents, indicating that it is in good standing;
- Organization's mission / purpose statement (if not included in the application);
- A list of your organization's Board of Directors, Officers and Executive Directors (if applicable);
- Project budget and detailed cost estimates including projected revenues and expenses;
- Most recent financial statements independently reviewed and / or signed by two board members.



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GRANT APPLICATION – GUIDELINES

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- (d) A budget for the year in which the grant is requested. ***(This may be the budget for your organization, or, if you are requesting funding for a specific project, submit the project budget only).***
- (e) Short description of the purposes of your organization

B. INITIATIVE AND FINANCIAL INFORMATION

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APPLICATION FOR FINANCIAL ASSISTANCE

ORGANIZATION

Legal Name: _____

Address:

E-mail: _____

Registration Number (Societies Act): _____

CRA Business Number (Registered Charities): _____

Contact Person: _____

Address:

Phone: Business _____ Home _____ Fax _____

ORGANIZATION PROFILE

Mission / Purpose Statement (or attach a copy):

Description of Clientele:

Number of Clients Served Annually: _____ Number of Volunteers: _____

Primary Geographic Region Served: _____

Registration Documents: Attach a copy of your organization's current registration document, indicating that it is in good standing.

List of Executives: Attach a separate page listing names, positions and addresses of all of your current executive and/or board of directors, including names, titles, address and home/work phone numbers.

Budget: Attach a complete budget for your specific project / event. The budget should show the amount of revenue received from user fees, fund raising activities, membership fees, other government funding, etc.

Financial Statements: Attach a copy of your most recent financial statements, signed by two directors.

GRANT INFORMATION

Nature of Initiative:

Initiative Start Date: _____

Initiative Completion Date: _____

Grant requested is for (check all applicable)

- | | |
|---|---|
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Facility: If the initiative is for capital or renovation project please provide:

Name of Facility: _____

Street Address or Legal Description:

Registered Holder of Land Title (Provide Documentation):

Facility Operator/Leaseholder:

Describe your initiative.

Describe how the grant funds will be used.

Provide a list of key dates and milestones for the project:

Which area does your initiative benefit?

- Electoral Area A (north from City boundary)
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- City of Powell River
- Tla'amin Nation

How will your initiative benefit the community?

Has or does your organization intend to submit an application for financial assistance to the City of Powell River?

- Yes No

How much funding are you applying for from the City of Powell River? _____

How will you evaluate the success of your service/project? (Describe in detail).

Total Project Budget: _____

Funding Requested from the qRD _____

INITIATIVE / PROJECT BUDGET:

Please give details of revenue and expense projections.

REVENUE (Please state source)			EXPENSES (Please itemize)	
Description	Amount		Description	Amount
SECURED FUNDS				
Secured Funds In-kind				
SECURED FUNDS SUBTOTAL				
ANTICIPATED FUNDS				
Funding Requested from qRD				
ANTICIPATED FUNDS SUBTOTAL				
Volunteer Labour (estimated value)				
TOTAL FUNDING			TOTAL EXPENDITURES	

Definitions:

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Secured funds in-kind: value of in-kind grants secured for the project to date

Anticipated funds: sales, grants and donations that are expected to provide money for the project. Please describe grants as cash or in-kind.

Expenses: include service provider quotes, if applicable.

Volunteer labour: should be directly related to the initiative for which funding is being requested.

SIGNATURES:

Signature of Applicant or Authorized Representative

Print Name and Title

Date

APPLICATION CHECKLIST:

- A completed and signed application form.

Attachments:

- Organization's current registration documents, indicating that it is in good standing;
- Organization's mission / purpose statement (if not included in the application);
- A list of your organization's Board of Directors, Officers and Executive Directors (if applicable);
- Project budget and detailed cost estimates including projected revenues and expenses;
- Most recent financial statements independently reviewed and / or signed by two board members.