



Policy No. 5.1

October 22, 2001  
Amended March 22, 2004  
Amended February 12, 2007  
Amended March 25, 2008  
Amended June 23, 2008  
Amended January 14, 2013  
Amended February 24, 2014

## ***Community Grant Program Policy, 2014***

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### **PURPOSE**

- A. The District of Sooke may contribute to the general interest and advantage of the community through programs of community grants as follows:

Category A: Annual Grant  
Category B: Bi-Annual Grant

- B. Over and above the core functions of providing municipal services, the District of Sooke may assist local not-for-profit organizations who propose, through community projects, programs, services, activities and/or events located primarily within the District of Sooke ("projects"), to improve the well being of the District of Sooke community as a whole. (Legislative Authority – section 8(1) and 8(2) of the *Community Charter*).
- C. The Community Grant Program is intended to assist and encourage District of Sooke based not-for-profit organizations incorporated under the *Society Act* of BC or unincorporated groups with demonstrated objectives that are not-for-profit or charitable in nature. District of Sooke organizations are ones where the majority of the members reside within the municipality.
- D. All community grants are contingent upon being included in the District of Sooke annual operating budget.

### **CATEGORY A: ANNUAL GRANT**

- i. Category A grants are made annually to a non-profit community group on the basis that it provides an ongoing valuable program to the community and is unable to raise all of its required funding without the District of Sooke assistance. These grants are not intended to provide on-going support for an indefinite period of time.
- ii. Category A grants are reviewed annually by Council to ensure there continues to be a proven need for District assistance and a demonstrated sustainability for the program.

## **CATEGORY B: BI-ANNUAL GRANT**

- i. Category B grants are normally for amounts exceeding \$500 and not exceeding \$7,000.
- ii. Category B applications will only be considered for new projects or the enhancement of existing programs, activities or events that will be completed or take place within 365 days of the date Council approves the grant.
- iii. Funding for Category B grants will not be provided for ongoing operational and maintenance costs. Project costs will be considered ineligible if they primarily relate to:
  - a. Administrative processes or supplies
  - b. Touring and/or travel expenses
  - c. Wages

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## **COMMUNITY GRANT PROGRAM**

### **1. General Eligibility Criteria**

- a. All grant applications will be received and reviewed by the Community Grant Review Committee (“Committee”) and Council will consider the Committee’s recommendations for grants.
- b. The Committee will only consider and recommend to Council for approval grant applications that meet the **Purpose** of the Policy, primarily benefit the District of Sooke community and have a demonstrated financial need in the areas of:
  - i. Sports and recreation
  - ii. Fine Arts and culture
  - iii. Heritage
  - iv. Public safety
  - v. Community welfare including promotion and economic development
  - vi. Community beautification
  - vii. Environmental
- c. No grant application will be considered by the Committee unless all applicable information has been provided and staff has confirmed completion of the grant application.
- d. Grant applications and uses must conform to section 25(1) of the *Community Charter* attached to this policy as Appendix 1.
- e. Grant applications must be consistent with the aims, objectives and standards of the municipality. Applications must not be at variance with the policies of the municipality (e.g. the *Official Community Plan*).
- f. Applications from organizations and events which cross municipal boundaries, but primarily benefit the District of Sooke, may also be referred to the Juan de Fuca Electoral Area Director and the Capital Regional District for funding.

- g. No application requests for funding to individuals will be considered.
- h. Applications for financial assistance for commitments or expenses incurred prior to the approval of the application will not be considered unless Council has agreed to the commitment.
- i. Applications for assistance for projects that are the responsibility of other levels of government will not be considered. This does not preclude the District of Sooke from participating in joint funding with regional bodies, provincial or federal governments or agencies.
- j. Grant applications for banquets, conferences, tournaments, etc. will be considered only for regional, national or international events taking place in the District of Sooke.
- k. In order to eliminate indirect funding, a grant will not be issued to an organization that in turn issues grants to other organizations *unless* the applicant can demonstrate to the Committee that grant monies received from the District of Sooke will not be used to fund grants to other organizations.
- l. Any direct or indirect benefit from a permissive tax exemption will be noted for review during the assessment process.

## 2. Application Procedures

- a. New Category A grant applications, and requests for changes to existing Category A grants, are due annually on September 30th the year prior to the requested funding.
- b. Grant applications under Category B from groups or organizations will be considered for funding twice in a calendar year:
  - i. The first application deadline is April 30th of each year;
  - ii. The second application deadline is September 30th of each year subject to availability of funds after the April 30<sup>th</sup> grants are awarded.
- c. Grant applications must be submitted to the Director of Finance of the District of Sooke on the official community grants application form attached as Appendix II with all requested support data in photocopy ready format. **The Committee will ONLY consider complete applications.** The application form can be obtained online at [www.sooke.ca](http://www.sooke.ca). or from the District of Sooke Finance Department.
- d. The application must:
  - i. indicate the nature of the project
  - ii. the reason for the project
  - iii. indicate the likely impact and benefit of the project on the District of Sooke
  - iv. indicate the number of people who will benefit from or participate in the project
  - v. include the names of those who will be involved in carrying out the project;
  - vi. include a list of the group's directors or organizers
  - vii. include a projected statement of revenue and expenses (Appendix II Budget)
  - viii. include a financial statement of the previous year's activity, if any
- e. Incomplete applications will not be forwarded to the Committee.

### 3. Assessment Process

- a. Grant applications will first be reviewed by staff to ensure each application is complete and then forward a summary listing and the applications to the Committee for review and recommendation.
- b. For an application to be considered by the Committee, applicants for grants must appear before the Committee to speak to their application. In all cases the presentation should be limited to 5 minutes. Applicants will be contacted prior to the Committee meeting date.
- c. Following presentations, the Committee will review the applications and make its recommendation to Council.
- d. The Committee will recommend grants based on the amount requested only. Funding may be recommended at an amount lower than what was requested.
- e. Council will review the Committee's recommendations and make its decision. **All decisions by Council are final.**
- f. Results of applications will be made known following approval by Council. Applicants will be contacted after the Council decision has been made.

### 4. Assessment Criteria

- a. Consideration of grant applications may be made based on the following order of preference:
  - i. Applications are in the areas of eligibility.
  - ii. The quality and excellence of the project.
  - iii. Applications with funding coming from sources outside the funds sought from the municipality.
  - iv. The group or organization has a demonstrated sound financial and administrative management.
  - v. The group or organization has a significant number of volunteers and a broad base of community support.
  - vi. The group of organization has a demonstrated track record of community service.
  - vii. The event/activity/program is accessible to and/or meets the needs of a large portion of the community's residents.
  - viii. The event/activity/program will enhance the present and/or future economic well being of the community.
- b. Category B grants will not be awarded for the same or a similar project in consecutive years.

## 5. Conditions of Funding

- a. The applicant must acknowledge the support of the District of Sooke in all print and publicity material related to the project including banners and signs on site during the event.
- b. Funds must be used for the purpose for which they were requested. If the original intended purpose can not be carried out, applicants must make a presentation to Council explaining the situation and their requested change. If funds have already been advanced prior to the requested change in purpose they must not be spent by the applicant until Council has approved the change. If Council does not approve of the change in purpose then the applicant must return the funds.
- c. Category B grant recipients must submit a final report (in the form attached as Appendix III) in writing **within 60 days of completion of the project** (see Category B, section ii) and may be asked to make a presentation to the Committee or Council which includes:
  - i. a brief evaluation of the project;
  - ii. copies of print material acknowledging the financial support of the District of Sooke (including but limited to newspaper articles, ads, press releases, social media, programs, etc.) ;
  - iii. a financial statement of actual revenue and expenses for the project (Appendix III Financial Statement);
  - iv. attendance figures (where applicable);
  - v. number of participants in the project ; and
  - vi. an evaluation of the impact on the community.
- d. Category A grant recipients must submit an annual report (in the form attached as Appendix III or in report form) and may be asked to make a presentation to the Committee or Council **annually on or before March 1<sup>st</sup>**.
- e. In the event that the project is not completed, the District of Sooke reserves the right to request the return of the grant.
- f. At the completion of a project, the successful applicant shall invite the District of Sooke to an opening ceremony, if such a ceremony is scheduled.
- g. The successful applicant shall provide acknowledgement of funding support by the District of Sooke (such as a plaque) for a tangible capital project once it is completed.

## APPENDIX I -- Policy No. 5.1

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Section 25(1) of the Community Charter states:

**25 (1)** *Unless expressly authorized under this or another Act, a council must not provide a grant, benefit, advantage or other form of assistance to a business, including*

*(a) any form of assistance referred to in section 24 (1) [publication of intention to provide certain kinds of assistance], or*

*(b) an exemption from a tax or fee.*

**APPENDIX II - Policy No. 5.1**

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**DISTRICT OF SOOKE - COMMUNITY GRANT PROGRAM**

**APPLICATION**

**If insufficient space to complete sections of this application, supplemental pages will be accepted if they are photocopy ready.**

Name of Organization: \_\_\_\_\_

Address of Organization: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

Contact Person: \_\_\_\_\_

<b>Category</b>	<b>Grant eligibility area:</b>
<input type="checkbox"/> A - Annual Grant	<input type="checkbox"/> Sports and recreation
<input type="checkbox"/> B - Bi-Annual Grant	<input type="checkbox"/> Fine Arts and culture
<input type="checkbox"/> C - Service Agreement	<input type="checkbox"/> Heritage
	<input type="checkbox"/> Public safety and community welfare
	<input type="checkbox"/> Community beautification
	<input type="checkbox"/> Environmental

Amount Requested: \_\_\_\_\_

Total Budget: \_\_\_\_\_  
(attach completed Budget Form)

Have you applied before? \_\_\_\_\_ When? \_\_\_\_\_ Grant Received? \_\_\_\_\_

Have you submitted a final report for previous grant? \_\_\_\_\_

Incorporation number and date of incorporation if applicable: \_\_\_\_\_  
(Applicants must be not-for-profit organizations or be otherwise publicly accountable)

Describe your organization, its mandate and program (s) \_\_\_\_\_

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Describe the community project, program, service, activity or event (“project”) for which funds are being sought. Please indicate why this project is unique or separate from other activities and why you think it should receive municipal funding.

Project description: \_\_\_\_\_

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Purpose of project: \_\_\_\_\_

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The names of those involved in carrying out the project: \_\_\_\_\_

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Date and Place of Project: \_\_\_\_\_



# COMMUNITY GRANT PROGRAM - Budget Template

Please include with your application

**Date:**

**Organization Name:**

Revenues	Other funders (please list)			Total
	Confirmed	Pending	In-kind	
<i>Grants:</i>				\$
District of Sooke request				\$
Other grants				\$
(list funder)				\$
(list funder)				\$
				\$
<i>Admissions / fees:</i>				\$
				\$
<i>Other:</i>				\$
				\$
<b>Total Revenues</b>				<b>\$</b>
<b>Expenses</b>				
				\$
				\$
				\$
				\$
				\$
				\$
				\$
<b>Total Expenses</b>				<b>\$</b>
<b>Net Income</b>				<b>\$</b>

**CHECKLIST:**

- Completed Application form
- Copy of BC Society certificate, if applicable
- Budget
- Final report for previous grant, if applicable
- Last Financial statement, if any

You are welcome to include any supporting material that would assist the District of Sooke in assessing your project.

Mail or deliver this application to: Community Grant Review Committee  
c/o Director of Finance  
District of Sooke  
2205 Otter Point Road,  
Sooke, B.C. V9Z 1J2

Phone: 250-642-1634 Fax: 250-642-0541  
Email: [info@sooke.ca](mailto:info@sooke.ca)

**DISTRICT OF SOOKE - COMMUNITY GRANT PROGRAM**

**FINAL REPORT**

**If insufficient space to complete sections of this application, supplemental pages will be accepted if they are photocopy ready.**

Name of Organization: \_\_\_\_\_

Address of Organization: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Grant eligibility area:

- Sports and recreation
- Fine Arts and culture
- Heritage
- Public safety and community welfare
- Community beautification
- Environmental

Community project, program, service, activity and/or event evaluation: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



# COMMUNITY GRANT PROGRAM - Financial Statement

Period Covered:

Organization Name:

<b>Revenues</b>	<b>Actual Results</b>
<i>Grants:</i>	\$
(list funder)	\$
(list funder)	\$
(list funder)	\$
	\$
<i>Admissions / fees:</i>	\$
	\$
	\$
<i>Other:</i>	\$
	\$
<b>Total Revenues</b>	<b>\$</b>
<b>Expenses</b>	
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
<b>Total Expenses</b>	<b>\$</b>
<b>Net Income</b>	<b>\$</b>