



Policy Name: Fee for Service Policy **TR-40**

Date Adopted:	February 4, 2014	Motion No.	14-04-12
Date Amended:	November 6, 2017	Motion No.	2017-28-12
Date Amended:	November 19, 2018	Motion No.	2018-24-20

Purpose:

The Council of the District of Tumbler Ridge recognizes that local community not for profit organizations and registered non-profit societies are valuable resources in helping the municipality provide a strong community focus. The services must assist the District to fulfill its goals and objectives.

Therefore, Council will consider the provision of financial assistance to registered non-profit societies or local not for profit organizations who seek support for proposals which will promote the following Council objectives:

- Enhancement of community identity and pride locally
- Encouragement and expansion of volunteerism
- Promotion of healthy living
- Promotion of history, arts, culture and roots
- Sustainability for the community (including financial stability)
- Enhancement of quality of life for residents

The District of Tumbler Ridge benefits from the services provided by organizations and therefore will pay an annual fee, through a three year contract, for service in recognition of these benefits.

Principles:

Services proposed by organizations must be based on the following principles to be eligible for fee for service funding:

- Provide a service which must be consistent with the District's strategic priorities and accomplish one or more goals:
 - Ensure Tumbler Ridge is a safe community
 - Enhance the quality of life for residents
 - Provide high quality services through outstanding governance
- The service must be inclusive of all residents.
- Services proposed by organizations must support strong social and community values and not be offensive to others, in order to be eligible for fee for service funding from the District of Tumbler Ridge.
- Services proposed by organizations must provide, enhance, supplement or support a service that might otherwise have to be provided by the District of Tumbler Ridge as a municipal responsibility to qualify for fee for service funding.

Administration:

Requests for funding under the Fee for Service Policy must be submitted to the attention of the Chief Financial Officer by January 8th 4:30pm each year, to be considered for fee for service funding in the following calendar year. Late applications may not be considered.

Applications will be evaluated by the District of Tumbler Ridge to determine eligibility as outlined in this document. All eligible applications will be forwarded to the District Council for discussion and subsequent approval. Organizations whose applications are deemed ineligible will be notified by the District without any further review by District Council.

Evaluation Criteria:

In addition to meeting the principles as outlined in this document, the following criteria will be considered:

- How the service reflects or accomplishes the District's goals and strategic priorities.
- Demonstration that other community organizations are partnering in providing the service to avoid duplication of services.
- Evidence of need for the service.
- Level of community support through public attendance and donations levels including the number of local volunteers.
- Quality of management (established track record, is the proposal well thought out and clear, etc.).
- Evidence of clear goals and expected outcomes.
- Uniqueness of the service i.e. does not duplicate but may complement an existing service.
- Evidence of financial need for the funding.
- Should the organization be requesting fee for service funding in the excess of prior requested amount, please provide rationale for the additional requested funds.

Who May Apply?

The funding applicant (organization) must meet the following criteria in order to qualify for funding:

- Be registered as a not-for-profit incorporated society in British Columbia;
- Be located in the District of Tumbler Ridge; and
- Be able to demonstrate that they are able to match the District's contribution in either other donation dollars or in-kind services.

The Council of the District of Tumbler Ridge wishes to ensure that assistance is provided only where it is needed, and where it will be well managed. Groups or organizations must have a defined governance structure that makes specific individuals responsible for the use of funds provided and accountable for the success or failure of the project, program, service, or event that is proposed.

In order to be eligible to receive assistance, the applicant registered non-profit society or local not for profit organization must demonstrate that it has sound financial and administrative management. The applicant must have a Board of Directors or similar governance structure and the persons making the application or receiving the funds must be legally authorized to act on behalf of the society or organization.

The applicant organization or society should have a proven track record of community service and have previously demonstrated the ability to administer other forms of assistance. The applicant organization or society must demonstrate a real effort in marketing and self-financing shown by a diversity of sources of revenue such as grants from other fund agencies, fundraising, sponsorships, ticket sales, subscriptions, memberships, user fees or other mechanisms.

Conditions:

- Completion of the funding application form and inclusion of the following required attachments:
 1. Annual Financial Statements (minimum Review Level).
 2. Annual Report filed with the Registrar of Companies as required by the *BC Societies Act*.
 3. Minutes of the last Annual General Meeting held by the organization including a list of the Board of Directors.
 4. Copy of the organization's Constitution and/or Governing Bylaws.
 5. Report on how the funding that was received in the previous year was utilized.
- Provide a presentation to Council if requested.
- Demonstration that the services provide a significant benefit to the District and its residents through a qualitative and quantitative analysis.
- District funds must be matched by equivalent donation dollars and/or volunteer commitments.
- District's contribution must be acknowledged on all promotional materials relating to the funded service.
- Funding provided on a three year basis so long as contractual conditions are met. Subsequent contracts will be subject to Council approval.

Not Eligible:

- Direct funding to individuals
- Services that would have been previously supported through other government funding (including Education and Health Care sectors)
- Demonstrations, marches and rallies
- For-profit organizations
- Retroactive funding or operating deficits
- Capital projects on District owned property



Fee For Service Policy APPLICATION FORM

Deadline for applications: 4:30 p.m. January 8, each year.

General Information:

The contents of this application are considered public information and may be released upon request.

Legal Name of Organization:		
Mailing Address:		Postal Code:
Phone:	Fax:	E-mail:
Contact Person:		Position:
Registered Society: Yes <input type="checkbox"/> No <input type="checkbox"/>	Society Registration No:	Is your society in Good Standing with the Registrar: Yes <input type="checkbox"/> No <input type="checkbox"/>
Total Funding Request (in dollars): Year 1 \$ _____ Year 2 \$ _____ Year 3 \$ _____		Proposal in best characterized as: <input type="checkbox"/> Event <input type="checkbox"/> Program Participants/beneficiaries will primarily be: <input type="checkbox"/> Youth <input type="checkbox"/> Seniors <input type="checkbox"/> Disadvantaged persons This proposal's activities can best be described as related to: <input type="checkbox"/> Arts and Culture <input type="checkbox"/> Recreation and Sports <input type="checkbox"/> Environmental, Social and Education

Declarations

I hereby certify that the information included with this application is complete, and is true and correct to the best of my knowledge, and that I have been authorized by the Board of Directors or Organization Executive to make this declaration and to submit this application on behalf of the above named organization.

Signature	Position	Date

I hereby declare that if our organization is successful in obtaining District of Tumbler Ridge fee for service funding that we give the District of Tumbler Ridge (or a third party appointed by the District) the right to review the project or event for which the fee for service funding was obtained to ascertain whether monies received were used for the stated purpose(s) set out in this application. In the event that there is suspicion of mismanagement/fraud relating to funding, the Council of the District of Tumbler Ridge must be notified immediately.

Signature	Position	Date

Return to:
The District of Tumbler Ridge,
Chief Financial Officer, P.O. Box 100, Tumbler Ridge BC V0C 2W0

General Fee For Service Contract Information: (attach additional pages as required)

1. Describe the operation and history of your organization:

2. Describe the specific activity to which the Fee For Service funding would be applied:

3. How was the need for your proposal identified and how will the activity meet this need:

4. How will this proposal benefit the community by promoting enhancement of community identity and pride locally, encouragement and expansion of volunteerism, promotion of healthy living, promotion of history, arts, culture, and roots, sustainability for the community (including financial stability), enhancement of quality of life for residents?

5. How will participants or beneficiaries become aware of this event/program?

6. What are the expected outcomes of the proposed activity?

7. List the number of citizens served by your organizations in the past two years and the number expected to be served during the 3 years following receipt of this Fee for Service Contract, if approved. Please provide any other statistics that may be helpful.

8. How will you evaluate your proposed activity at the conclusion of the project or event?

9. Identify any similar services or events offered in the District and describe how your proposed activity is unique.

10. List any organizations with whom you collaborate or partner in order to provide services.

11. Please indicate how your organization will recognize the District's contribution to your project or event.

12. Please describe the governance structure of your organization.

13. Please describe the financial controls and administrative management process in your organization.

14. Please describe the organization's financial need for District funding assistance for this proposal.

15. What are the total annual revenues for your organization?

16. Will this activity be complete within three year period of receipt of the District Fee For Service Contract?

17. Will this fee for service be used to pay District property tax?

18. Will this fee for service funding be used to fund staff training and professional development? If so, please give details.

19. Please describe your organization's membership criteria, detail how many members you have, and indicate what volunteer activities the organization undertakes.

20. Does your organization have paid staff and if so, how many staff in total?
(Where the District Fee For Service contribution is used towards the payment of salaries and wages, a Schedule is to be submitted together with the grant application, specifying approved actual and budgeted salaries and benefits per staff member.

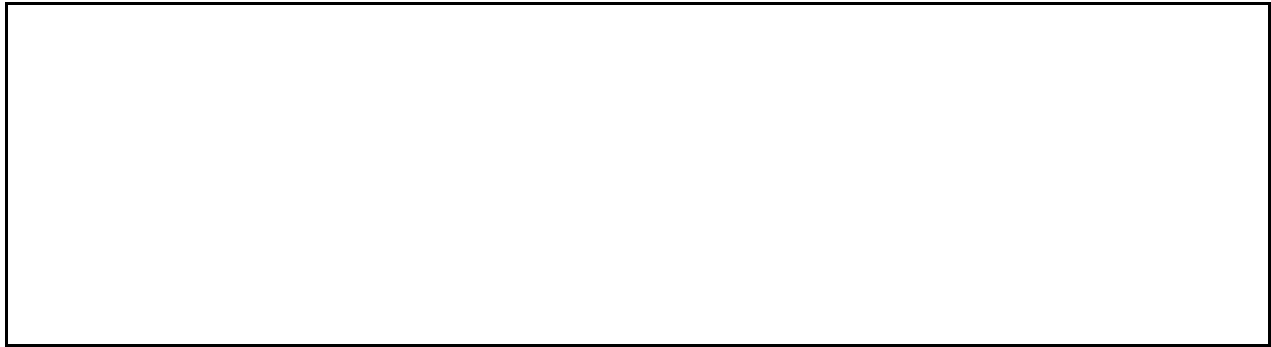
21. Outline your contingency plan if this funding application is not approved.

22. Please list any assistance your organization has received from the District in the previous four years.

23. What previous sources of funding have you administered from sources other than the District?

24. Please describe the marketing and self-financing activities of your organization. Where do the organizations revenues come from and approximately what percentage is derived from each source?

25. What are your organizations overall goals and objectives for the coming three years?



Applicants seeking assistance greater than \$1,000.00 per year must provide:

- a detailed consolidated budget for the entire organization including both revenues/expenditures and a specific budget for the project or event for which assistance is requested;
- where a portion of funds are intended to go towards salaries the applicant is required to provide an itemized breakdown detailing the following:
 - position title
 - wages
 - benefits
 - gross position expenses
- a current financial statement prepared and signed by the appropriate person (i.e.: CA, CGA, CMA, comptroller, bookkeeper, financial officer, treasurer) business plan or statement of objectives;
- a quarterly financial report to be submitted prior to the release of fee for service funding (for funding in excess of \$5,000.00);
- constitution and bylaws of the organization if such exist.

Policy – Finance

For internal use only

Reviewed by:			
Received:	Day	Month	Year
Required documentation attached	<input type="checkbox"/> Yes		<input type="checkbox"/> No
All questions completed	<input type="checkbox"/> Yes		<input type="checkbox"/> No
Signatures and initials complete	<input type="checkbox"/> Yes		<input type="checkbox"/> No
Meets eligibility criteria	<input type="checkbox"/> Yes		<input type="checkbox"/> No
If No, briefly describe disqualifying circumstances			
REVIEWER'S COMMENTS			