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**POLICY:** FINANCIAL ASSISTANCE/GRANTS-IN-AID

**SECTION:** Finance **POLICY #:** FIN-003

**PREPARED BY:** Jennifer Larson **PAGE:** 1  
Chief Financial Officer

**EFFECTIVE DATE:** January 23, 2017

**Supersedes:** Original Jul 11 2016 Policy

**AUTHORIZED:** Galina Durant Jennifer Larson  
Mayor Chief Financial Officer

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**PURPOSE:**

The District of Stewart annually receives requests for financial assistance and grants from individuals, groups and community organizations in support of programs, services or functions that benefit community. The District of Stewart wishes to support organizations that can demonstrate a record of past community service, solid financial management and other criteria as outlined in this policy.

**POLICY:**

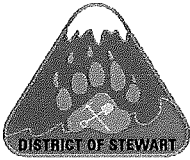
The final decision on all financial assistance/grants rests with Mayor and Council. Council reserves the right to waive or make exception to any part of this financial assistance/grant policy.

Financial assistance/grants will only be awarded to projects that can demonstrate that they meet the criteria specified in this policy. Council cannot provide assistance to industrial, commercial or business undertakings as defined in the Community Charter.

"In-kind" labour and/or services will not be considered as a reimbursable expense to organizations. Financial assistance (Grants, Fee Waivers or Loans) will not be considered for projects which have been completed or which will have begun prior to the decision date.

This policy applies to requests for grants or to waive fees in excess of \$1000. Requests for amounts less than \$1000 will be approved by the CAO. Council will establish a Small Grants-In-Aid Fund each year with the annual budget. The CAO will ensure that Small Grants will not exceed the budget allocation.

The application and guidelines for Grants-In-Aid over \$1000 and under \$1000 form part of this policy.



## District of Stewart: Small Grant-in-Aid Application

*Small Grant-in-aid provide funding up to \$1000 for groups or non-profit organizations within the District of Stewart in order to support services or events which will benefit the residents of Stewart.*

**Deadline for Applications: 30 days prior to event or the date funds are required**

### **Eligible Organizations:**

- Any group or non-profit organization (*excluding businesses, commercial or industrial entities*).

### **Eligible Projects:**

- Funding for any of the following which benefit the residents of Stewart
  - o specific capital projects or purchase of equipment;
  - o specific cultural or festival events;
  - o use of municipal facilities at no cost or below normal rates;  
(**note:** *for ongoing use of facilities where value is in excess of \$1000 the applicant must complete the Grant-in-Aid application*);

### **Ineligible Projects:**

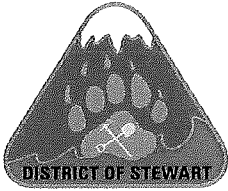
- Funding directly benefits individuals or a business, commercial or industrial entity;
- services are already being provided by another organization or business and would be in direct conflict.

### **Application Assessment:**

- Priority will be given to projects, events or services that:
  - o are inclusive and benefit the residents of Stewart as a whole;
  - o improve or enhance the ideal of a healthy community;
  - o improve or enhance the local economy (ie: events that attract tourism);
  - o meet a need or priority as identified by the municipality.

### **Application Process:**

1. Complete the funding application and submit it to the District of Stewart municipal office at least 30 days prior to the event or the date funds are required.  
(*Note – requests for use of municipal facilities must be received 30 days prior to the date facilities are to be used in order to avoid any conflict with other users. Applications will be considered on a “first-come” basis*).
2. Applicants must also complete the “User Permit application” and pay any insurance fees as required and submit it with this application;
3. Administration will confirm that the application meets the general requirements and that all required information is supplied, and may contact the applicant for more information;
4. Administration will notify the applicant of the decision within 15 days;



## APPLICATION FOR SMALL GRANT REQUEST

**Note:** Applications will be considered throughout the year and must be received 30 days prior event or date funds are required

<b>Name of Organization:</b>							
<b>Mailing Address:</b>							
<b>Contact Name:</b>				<b>Title:</b>			
<b>Telephone Number:</b>				<b>Email Address:</b>			
<b>Is your organization registered under the Society Act?</b>	<b>Yes</b>				<b>No</b>		
<b>Is your facility open to the public or to members only:</b>	<b>Public</b>				<b>Members Only</b>		
<b>If members only, is membership available to any individuals in the community?</b>					<b>Yes</b>		<b>No</b>
<b>Request for Financial Assistance:</b>							
<b>Request for use of Municipal facilities:</b> <i>(attach User Permit Application)</i>							

**Describe your organization. Include a short history and briefly describe the goals and objectives. (Attach a separate sheet if necessary)**

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**How does your organization benefit the community of Stewart?**

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**Briefly describe why you have a financial need for District financial assistance and what efforts have been made to raise other funding?**

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**Briefly provide a description of project (s) your organization will use the grant funding for:**

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**Briefly provide a financial break down of the cost and source(s) of funding for the project(s)?**

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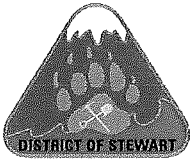
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Authorized Signature



## District of Stewart Grant-in-Aid (Over \$1000)

*Grants-in-aid provides up to \$100,000 in grant funding for non-profit organizations within the District of Stewart in order to improve, expand or develop services or events which will benefit the residents of Stewart.*

### **Deadline for Applications: October 31<sup>st</sup>**

Applications must be received at the Municipal office by October 31<sup>st</sup> in order to be considered for financial assistance in the following year.

### **Eligible Organizations:**

- Registered non-profit organizations that are in good standing (do not need to be a registered charity but must be registered as a society)

### **Eligible Projects:**

- Funding for any of the following which benefit the residents of Stewart
  - o ongoing operational expenses;
  - o specific capital projects or purchase of equipment;
  - o specific cultural or festival events;
  - o use of municipal facilities at no cost or below normal rates;

### **Ineligible Projects:**

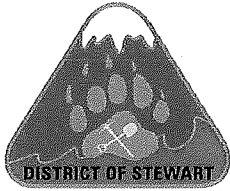
- Funding benefits a small or select group of residents or directly benefits directors of the organization;
- Projects where required funds already exist or where another source of funds would be more appropriate;
- A service that is already being provided by another organization or business and would be in direct conflict;
- Requests for funding less than \$1000 (*please see "Small Grant Request Application" which will be administered by the Chief Administrative Officer directly*).

### **Application Assessment:**

- Priority will be given to projects, events or services that:
  - o are inclusive and benefit the residents of Stewart as a whole;
  - o improve or enhance the ideal of a healthy community;
  - o improve or enhance the local economy (ie: events that attract tourism);
  - o meet a need or priority as identified by the municipality;

### **Application Process:**

1. Complete the funding application and submit it to the District of Stewart Municipal Office by October 31<sup>st</sup>.
2. Administration will confirm that the application meets the general requirements and that all required information is supplied, and may contact the applicant for more information.
3. Administration will contact the applicant to schedule a date for the presentation to Council (in November or December)
4. Administration will notify the applicant of the decision of Council by January 31<sup>st</sup>
5. A funding agreement will be provided to the applicant for signature.



## APPLICATION FOR GRANT-IN-AID FOR COMMUNITY ORGANIZATIONS

**Note:** Application must be received by October 31<sup>st</sup> at the District Office to receive consideration for financial assistance in the following year

<b>Name of Organization:</b>							
<b>Mailing Address:</b>							
<b>Contact Name:</b>				<b>Title:</b>			
<b>Telephone Number:</b>				<b>Email Address:</b>			
<b>Is your organization registered under the Society Act?</b>	<b>Yes</b>			<b>No</b>			
<b>Is your facility open to the public or to members only:</b>	<b>Public</b>			<b>Members Only</b>			
<b>If members only, is membership available to any individuals in the community?</b>	<b>Yes</b>			<b>No</b>			
<b>Amount Requested:</b>							
<b>Total Cost of Project/Event:</b>							

**Describe your organization. Include a short history and briefly describe the goals and objectives. (Attach a separate sheet if necessary)**

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**How does your organization benefit the community of Stewart?**

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**Briefly describe why you have a financial need for District financial assistance and what efforts have been made to raise other funding?**

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**Briefly provide a description of project (s) your organization will use the grant funding for:**

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**Briefly provide a financial break down of the cost and source(s) of funding for the project(s)?**

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**Attachments Required:**

- Most recent Financial Statements (or Balance Sheet and income statement signed by 2 members of the board)
- Budget for upcoming year – or for specific project/event
- Most recent Society Annual Report (if Directors have changed, provide list of current directors)

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Authorized Signature