City of Richmond

Report to Committee

To:	General Purposes Committee	**Date:**	July 9, 2008
From:	Joe Erceg, MCIP General Manager, Planning and Development	**File:**	
Re:	**2008 Richmond City Grant Program**		

Staff Recommendation

That, as per the report entitled "2008 Richmond City Grant Program", dated July 9, 2008:

1. the existing City Grant Policy 3705 (**Attachment 1**) and existing Grant Application Form (**Attachment 2**) be rescinded, and

2. the proposed 2008 Richmond Grant Program (**Attachment 3**) be adopted.

Joe Erceg, MCIP
General Manager, Planning and Development

Att. 4

FOR ORIGINATING DEPARTMENT USE ONLY		
ROUTED TO: CONCURRENCE	**CONCURRENCE OF GENERAL MANAGER**	
Budgets ....Y ☑ N ☐ Recreation & Culture ....Y ☑ N ☐		
REVIEWED BY TAG YES ☑ NO ☐	**REVIEWED BY CAO** (Acting) YES ☑	NO ☐

Staff Report

Origin

On May 20, 2008, a revised 2008 Richmond Grant Program was presented to General Purposes Committee and the following motion was passed:

> "That, as per the report entitled "2008 Richmond City Grant Program", dated May 5, 2008, the proposed 2008 City Grant Program Application Form be circulated to the Richmond Community Services Advisory Committee and the Richmond Communities Committee for comments, prior to consideration of final Program approval."

Findings of Fact

Consultation
As per the General Purposes Committee resolution, the Richmond Community Services Advisory Committee (RCSAC) and the Richmond Communities Group (RCG) were consulted regarding the clarity of terms, readability, eligibility requirements and other aspects of the application process that may present barriers to accessing City Grants.

1. Richmond Communities Group (RCG)
Staff met with the RCG (formerly the Council of Community Associations) on May 28, 2008 to present and receive feedback regarding the draft application form. The RCG found the form onerous for the amount of funding received by their organizations (with the exception of the $50,000 Summer Project Grant). The Hamilton and Sea Island Community Associations received $1,000 each for community events and the Steveston Community Society received $7,000 for programs, services, and events. The RCC passed the following motion:

"The Richmond Communities Group recommends that the City revise the Grant Application Form to make it simpler and easier to complete."

No specific suggestions regarding how to amend the form, other than shortening and simplifying it, were provided. Interest in a training workshop about how to use the new form was expressed.

2. Richmond Community Services Advisory Committee (RCSAC)
Staff met with the Richmond Community Services Advisory Committee (RCSAC) on June 12, 2008, to receive feedback regarding the draft application form. Comments from the Minutes are:

- "The same application form is used for all grants regardless of size, creating an onerous reporting process for small grants. Can a stratified system be introduced to ease the reporting and application burden for the smaller grants?
- Can the timeframe between the advertisement of the grants and the deadline for application submissions be increased to two months?
- Current letters of support and verification requirements are time consuming and difficult to satisfy. Can verification come in the form of e-mails or phone calls?
- Can the requirement of four hard copies plus supporting documentation be changed or removed? Could the application be submitted electronically instead?"

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Specific suggestions (e.g., formatting, wording clarification) were also received from two RCSAC members and several minor revisions were made.

Some RCSAC members (Richmond Family Place, Richmond Women's Resource Centre, and Touchstone) previously provided suggestions that were incorporated into the draft application form presented to General Purposes on May 20, 2008 (e.g., inclusion of a table regarding outcome measurement). Results of this previous consultation included that the proposed application form clarifies expectations, provides more direction, helps groups to identify the benefits of their work, and is more user-friendly.

Additional Committee Information Requests
At the May 20th 2008 General Purposes Committee discussion of the proposed Grant Program, staff were asked for information regarding what percentage of the City Budget is earmarked for social services, as compared with other municipalities, and for information regarding social service funding provided outside of the Grants Program.

City Grant Allocations to Social Services
In Richmond, the 2008 Grant Allocations to the Health, Social and Safety Services Category ($429,250) is about 0.09% of a total City budget of $471 million.

Municipal comparisons of social service grants as a percentage of total budgets is challenging because each municipality organizes its grant program differently. For example, Burnaby does not distinguish between social and other grants (e.g., arts & culture, heritage, amateur sports and community events) and includes reduced lease payments by social service agencies in City facilities. In 2008, these expenditures amounted to 1.1% of their total budget. Likewise, New Westminster does not distinguish between social service and other grants. In 2007, approximately 4.5% of their budget was allocated in grants. This total included neighbourhood livability projects related to diverse topics such as traffic and transportation, climate change, economic development and tourism.

Social Service Funding Outside the Grant Program
In addition to the City Grant Program, the City budgeted $156,896 in the 2008 budget for various disability services that would otherwise fall under the Grant Program (Disability Resource Centre, $70,000; Richmond Committee on Disability, $40,496; Equestrian Therapeutic Society, $46,400), as well as $95,000 for Touchstone's Restorative Justice Program. Added to the Health, Social and Safety Services grants, this total ($681,146) amounts to 1.4% of the total City budget. However, the total monetary value of City contributions to social services is higher and may vary from year to year, including the following:

-   A separate program exists for Child Care Grants, offered on an annual or bi-annual basis. Generally, up to $50,000 is made available at each call for applications.

-   Occasionally organizations have requested and received funding outside of the City Grant process (e.g., In 2006, the Richmond Women's Resource Centre received $12,000 bridge funding due to changes in the Provincial Direct Access Gaming Funds process).

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- In addition to budget allocations, the City also provides other benefits to social services of considerable monetary value, including nominal lease payments (e.g., Nova Transition House, Richmond Family Place, four City-owned child care centres), tax exemptions (e.g., Nova Transition House), and the use of City property (Caring Place).

- In-kind services have also occasionally been provided to social services on a temporary basis, including meeting space, workshops, staff time, community bus service, and other forms of assistance.

Groups applying for Grants of $2500 or less

For reference, as both the RCG and the RCSAC expressed concern regarding groups applying for small grants, the following table provides information regarding 2008 grant requests of $2,500 or less:

Group	Nature of Request	Amount Requested	Amount Allocated
Cultural and Community Events			
Hamilton Community Association	Event – to support the annual Hamilton Festival	$1,000	S1,000
Pacific Piano Competition Society	Event – to support the Pacific Piano Competition	$2,500	$1,000
Richmond Artists Guild	Event - to advertise the Fraser River Festival	$1,500	$750
Sea Island Community Association	Event – to support the annual Burkeville Daze	$1,200	$1,000
Textile Arts Guild	Operating Assistance – to provide quilts	$2,000	$1,000
Health, Social and Safety Services			
Community Meal, St. Alban's Hall	Programs & Services	$1,500	$1,500
Richmond Carefree Society	Operating Assistance, Programs & Services	$2,500	$2,500

These seven applicants constitute 15% of the total of 48 applicants (20% of Cultural and Community Events applicants and 9% of Health, Social & Safety applicants).

Other 2008 applicants applied for higher amounts but were awarded $2,500 or less (e.g., the Gulf of Georgia Cannery applied for $4,550 and was awarded $1,000; SUCCESS Richmond Services applied for $23,660 and was awarded $1,000).

Analysis

Proposed 2008 City Grant Program

No changes have been made to the proposed 2008 City Grant Program, as presented in the May 5th, 2008 staff report.

Revised Application Form

Both the RCG and the RCSAC suggested that the form and process be simplified for those agencies applying for small grants. Staff recommend the following changes:

1. In 2007, applications for 2008 City Grants were received for an eight-week period (August 16th to October 12th); the application period will be extended to a nine-week period for future applications;

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2. General letters of support will not be required, but documentation (e.g., letters, e-mails) from partners confirming their prospective partnership role(s) will be required;
3. The requirement of four copies has been clarified and remains the same as previous years (i.e., four sets of documentation - 1 original plus three copies);
4. Other minor wording and format changes to streamline and clarify the application form have been made.

The suggestion of having separate forms or requirements for organizations seeking small grants was considered but not recommended because City accountability requirements must be respected when seeking public funding, regardless of the amount requested or awarded.

The seemingly greater complexity of the form is primarily due to the inclusion of checklists and tables that require specificity regarding benefits, budgets and partnerships. While some applicants may find this new format challenging, particularly when completing for the first time, staff consider that the greater clarity required will ultimately be of benefit to the applicant as well as to the City. It is anticipated that, once applicants have become more familiar with the new form, it will be simpler to complete than the current open-ended format.

To further mitigate challenges experienced by applicants working with the new application form,

- a daytime and an evening orientation session will be held in the Fall for 2009 prospective applicants;
- the RCSAC has conducted a mentoring survey of membership agencies, in which three organizations indicated that they would like mentoring in grant writing, and two indicated that they would be willing to mentor other RCSAC members;
- during the 2009 grant cycle, staff will monitor the new Program for any difficulties experienced by applicants, as well as challenges in program implementation. Staff will convey the results of this review, including any needed Program revisions, to Council as required.
- please note that the proposed Program allows minor changes to the application form, staff checklist and grant summary sheet without seeking Council approval.

Financial Implications

As per the proposed Program:
- starting in 2009, an annual cost of living factor will be added to the base Richmond Grant Program funding; and
- the base Richmond Grant Program funding is to be reviewed every five years, beginning in 2013.

Conclusion

Staff recommend that:

1. the existing City Grant Policy 3705 (**Attachment 1**) and existing Grant Application Form (**Attachment 2**) be rescinded, and

2. the proposed 2008 Richmond Grant Program (**Attachment 3**) be adopted.

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Attachment 4 contains the original report presented to General Purposes on May 20, 2008.

Lesley Sherlock
Social Planner
(604-276-4220)

LS:ttc

ATTACHMENT 1: Existing Policy
ATTACHMENT 2: Existing Forms
ATTACHMENT 3: July 7, 2008 Proposed 2008 City Grant Program
ATTACHMENT 4: Staff report presented to General Purposes on May 20, 2008 with original attachments

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City of Richmond

Page 1 of 3	Adopted by Council: June 12, 2000	POLICY 3705
File Ref: 1085-00	GRANTS PROGRAM	

POLICY 3705:

It is Council policy that:

The principles on which grant funding will be approved are as follows:

A. GENERAL PRINCIPLES:

The City of Richmond supports the enhancement of a positive quality of life for all its residents, and the Council recognizes that one method of helping to achieve this goal is through an annual grants program.

Applications from non-profit or registered charitable organizations and/or groups are eligible for a City grant on the basis that they:

- offer projects, programs, services or events which have a demonstrated need in the community;

- provide the greatest benefits to the largest number of Richmond residents;

- exercise co-ordination and co-operation with other groups to prevent duplication of projects, programs, services or events;

- provide evidence of having sought funding from a variety of sources;

- promote volunteer participation and citizen involvement;

- apply a "user pay" philosophy, where applicable;

- use innovative approaches and techniques in addressing community issues;

- provide documentation supporting the financial need for funding, including, but not limited, to the current financial statements of the applicant;

- show real and financial need, and demonstrate the impact that would occur following non-funding from the City;

and on the understanding, that:

- Not all organizations meeting these general principles will automatically receive a grant or grant increase.

- Approval of a grant by the City in any particular year should not be viewed as an automatic ongoing source of annual funding. Grant renewals are not automatic.

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City of Richmond

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nor is any increase in funds. Grant approvals in a particular year, do not guarantee that grant requests in subsequent years will be successful.

- Only one application per year will be accepted per organization.

B. DEFINITIONS OF ELIGIBLE GRANT CATEGORIES:

1. **Category 1 and Category 2 Applicants – Applicable category for any application to be determined by Council.**

   Applicants may apply for Category 1 or Category 2 designation as follows:

   Category 1 applicants must be deemed to be providing unique and essential services to the community of Richmond. Applicants must demonstrate how their services fit under this designation. Applicants who are deemed to be Category 1 may apply for funding in subsequent years; and

   Category 2 applicants who receive funding would not be eligible to apply or receive funding for two subsequent years.

2. **Operating Assistance**

   Regular operating expenses or core budgets of established organizations, including supplies and equipment, heat, light, telephone, photocopying, rent, and administrative support salaries.

3. **Projects**

   One-time-only projects which respond to health, social and cultural needs within Richmond, must have a specific set of goals and objectives, and have a defined start and finish date.

4. **Programs and Services**

   Ongoing programs and services which contribute to the health and social well-being of Richmond residents, or which contribute to the general interest and advantage of the City.

5. **Events (Community Promotion)**

   Events which enhance and contribute to the cultural life of Richmond, which promote community involvement and spirit, and which have a defined start and finishing date (but may also be held annually), and which promote Richmond outside the City.

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6. **Council Discretion**

   Council may, at its discretion, award grants to groups which offer a service deemed by Council to be of value to the City, or to community committees whose mandate is to function for the good of the City and its residents.

C. EXCLUSIONS FROM ELIGIBILITY FOR CITY GRANT:

- Applications from individuals

- Activities which are restricted to people of specific religious or ethnic groups

- Annual fund-raising campaigns, form letter requests or telephone campaigns

- Building funds or capital construction campaigns

- Debt retirement

- Expenses related to attendance at seminars, workshops, symposiums, or conferences

- Agencies which primarily fund other organizations

D. GRANTS REVIEW CONSIDERATIONS

Not all organizations meeting the criteria will automatically receive a grant. Grant allocations are dependent on the Grants budget established by City Council.

In reviewing grant applications and preparing recommendations for grant allocations, Council may give primary consideration to the following factors:

- Basic eligibility and demonstrates organizational efficiency, effectiveness and stability.

- numbers of Richmond residents served
- quality of service
- financial need of the organization
- community interaction
- role and number of volunteers
- use of existing community services and facilities
- local input into governance

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City of Richmond
6911 No. 3 Road
Richmond, BC V6Y 2C1
604-276-4000
www.richmond.ca

Grant Application Package

City Grant Application forms are available from the **Information Counter at Richmond City Hall.**
Please read these instructions before completing the application form.

Instructions

1. Complete the form and send the *original plus three copies* to the Information Counter at Richmond City Hall by the stated deadline. **Note: Late submissions will not be considered.**

2. Please ensure your application includes the following documents:

   ☐ A list of the organization's Board of Directors, Officers and Executive Directors.

   ☐ The organization's audited financial statements for the most recent completed fiscal year. If audited financial statements are not available, submit the financial statements for the most recent completed fiscal year endorsed by two signing officers of the Board of Directors.

   ☐ The organization's 2008 fiscal year operating budget.

3. Submissions that do not contain complete financial and budgetary information will be considered incomplete and will not be accepted. Submissions should be on **letter-size paper,** and **single-sided.**

4. Please keep promotional support documents to a minimum.

5. If you have general questions regarding your application, please contact Lesley Sherlock, Social Planner, at 604-276-4220.

6. Return completed City Grant Application Form and enclosures by **Friday, October 12th, 2007** to:

   **Information Counter
   (City Grant Applications)
   Richmond City Hall
   6911 No. 3 Road, Richmond, BC V6Y 2C1**

7. Upon receipt of your application, a member of the City Staff Grants Review Committee may contact you to go over its details.

8. Decisions regarding funding allocations within the City Grants Budget rest with Richmond City Council.

9. Following Council approval of the Grants Budget, each applicant will receive notification of Council's decision pertaining to the application. The budgetary approval process may take three to five months.

Richmond Grants Policy

General Principles

The City of Richmond supports the enhancement of a positive quality of life for all its residents, and Richmond City Council recognizes that one means of helping to achieve this goal is through an annual grants program.

Applications from non-profit or registered charitable organizations and/or groups are eligible for a City grant on the basis that they:

- Offer projects, programs, services or events that have a demonstrated need in the community;

- Provide the greatest benefits to the highest number of Richmond residents;

- Exercise co-ordination and co-operation with other groups to prevent duplication of projects, programs, services or events;

- Provide evidence of having sought funding from a variety of sources;

- Promote volunteer participation and citizen involvement;

- Apply a "user pay" philosophy, where applicable;

- Use innovative approaches and techniques in addressing community issues;

- Provide documentation supporting the financial need for funding, including, but not limited to, the current financial statements of the applicant;

- Show real and financial need and demonstrate the impact that would occur following non-funding from the City;

and on the understanding that:

- Not all organizations meeting these general principles will automatically receive a grant or grant increase;

- Grant renewals are not automatic, nor is any increase in funds;

- Grant approvals in a particular year, do not guarantee that grant requests in subsequent years will be successful;

- Only one application per year will be accepted per organization.

Exclusions from Eligibility for City Grant

- Applications from individuals;

- Activities which are restricted to people of specific religious or ethnic groups;

- Annual fund-raising campaigns, form letters requests or telephone campaigns;

- Building funds or capital construction campaigns;

- Debt retirement;

- Expenses related to attendance at seminars, workshops, symposiums, or conferences;

- Agencies which primarily fund other organizations.

Grant Review Considerations

Not all organizations meeting the criteria will automatically receive a grant. Grant allocations are dependent on the Grants budget established by City Council.

In reviewing grant applications and preparing recommendations for grant allocations, Council may give primary consideration to the following factors:

- Basic eligibility and demonstrated organizational efficiency, effectiveness and stability;

- Number of Richmond residents served;

- Quality of service;

- Financial need of the organization;

- Community interaction;

- Role and number of volunteers;

- Use of existing community services and facilities;

- Local input into governance.

Definitions of Eligible Grant Categories

1. Operating Assistance

Regular operating expenses or core budgets of established organizations, including supplies and equipment; heat; light; telephone; photocopying; rent; and administrative support salaries.

2. Projects

One-time-only projects, which respond to health, social and cultural needs within Richmond, have a specific set of goals and objectives, and which have a defined start and finish date.

3. Programs and Services

Ongoing programs and services which contribute to the health, social and cultural well-being of Richmond residents, or which contribute to the general interest and advantage of the City.

4. Events (Community Promotion)

Events which enhance and contribute to the cultural life of Richmond, which promote community involvement and spirit, and which have a defined start and finish date (but may also be held annually), and which promote Richmond outside the City.

Council Discretion

Council may, at its discretion, award grants to groups which offer a service deemed by Council to be of value to the City, or to community committees whose mandate is to function for the good of the City and its residents.

City of Richmond
6911 No. 3 Road
Richmond, BC V6Y 2C1
604-276-4000
www.richmond.ca

Grant Application Form

Complete the form and return the original plus three copies by **Friday, October 12th, 2007** to the **Information Counter**, Richmond City Hall, 6911 No. 3 Road, Richmond, BC V6Y 2C1.

1. Identification of Applicant

Organization Name:	
Have you ever applied for a City grant under any other name in the last 5 years?	
Mailing Address: (Street, City, Postal Code)	**Phone:**
	Fax:
	Contact Person:
	Contact Phone:

2. If this is a first-time request, attach a history and objectives of the organization.

3. Board of Directors – Attach a sheet listing names, positions and addresses of all the Board Members and Officers.

4. Grant Information

A. Amount of City grant request: $_____.

B. Grant request is for: (check applicable)

☐ Operating Assistance
☐ Project
☐ Programs and Services
☐ Events

C. Describe how the grant would be used:

D. Describe how the City grant funding benefits Richmond residents:

E. How many people are served by your organization? _____.

F. How many Richmond residents are served by your organization? _____.

G. Describe the unique nature, and value, of your City grant request in comparison to projects/programs of a similar nature in the community:

4.　Grant Information (Cont'd.)

H.　Name any Richmond organizations that you collaborate with to ensure the success of your project/program:

I.　Describe how you work with the above organization(s):

J.　How will your organization measure and evaluate the community benefit of your project/program? Describe in detail:

5. Financial Overview of the Organization

A. Please attach the following information for the organization:

- The audited financial statements for the most recently completed fiscal year, including an Income Statement and Balance Sheet; and

- The 2008 fiscal year's budget including projected statement of expenses and revenues.

B. If your financial statement shows a surplus, please justify or explain the reason for this surplus:

C. If the organization received a City grant from Richmond last year, please **detail specifically** how the grant monies were spent. Please indicate if there was a surplus from the City grant money.

D. If given a City grant this year, please detail specifically how you will spend the funds:

E. Please describe the impact to your organization if a City grant is not received:

5. Financial Overview of the Organization (Cont'd.)

F.   Itemize any services that the organization receives from the City of Richmond (e.g. use of City facility, subsidized rents, property tax relief, photocopying, staffing etc.):

G.   If the organization received grants from other sources last year, please list the sources and amounts received, together with the specific details of what was accomplished with each of the grants.

H.   Is your organization applying for funding from other sources this year? List sources and amounts requested.

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6. Staffing

	Number	Avg. Hrs/Week
Full-time employees:		
Part-time employees:		
Volunteers (excluding board members):		

PLEASE DO NOT ATTACH BULKY PACKAGES

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July 7, 2008

2008 Richmond Grant Program City Of Richmond

Coordinated by The Policy Planning Division
City Of Richmond

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ATTACHMENT B	GRANT PROGRAM APPLICATION FORM
ATTACHMENT C	AN INTERNAL STAFF CHECKLIST TO SUMMARIZE ANNUAL GRANT APPLICATIONS
ATTACHMENT D	GRANT APPLICATION SUMMARY SHEET (FOR COUNCIL)

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THE 2008 RICHMOND GRANT PROGRAM

1. Purpose

The purpose of the 2008 Richmond Grant Program is improve the previous Grant Program, to better:
- Achieve the City's Corporate Vision: "To be the most appealing, livable well managed City in Canada",
- Ensure that the limited Program dollars are effectively spent,
- Improve Program benefits, effectiveness, management, administration and phases.

2. Program Context

- The City of Richmond is one of the most diverse and family oriented communities in Canada.
- Richmond residents voluntarily form many types of community groups to meet a wide range of social, economic and environmental interests.
- In doing so, these groups assist in creating a vibrant, livable and appealing City.
- The Richmond City Council acknowledges that these groups:
    - Are essential in building a viable community,
    - Make Richmond a better place to live, work and play,
    - Address important needs and issues,
    - Wish to contribute their ideas, vast experience, abilities, and education,
    - Sometimes require financial assistance to implement their projects.

3. Principles

The Program is based on the following principles:
- Support The City's Corporate Vision
- Support Non Profit Groups
- Benefit Richmond Residents
- Maximize Program Benefits
- Promote Volunteerism
- Build Partnerships
- Increase Community Group Capacity
- Cost Sharing
- Cost Effectiveness
- Grants Earned - Not An Entitlement
- Promote User Pay of Community Group Programs
- Innovation.

4. Goal Of The City Grant Program

The goal of the program is to build strong communities by assisting non-profit community groups in delivering services to Richmond residents.

5. Program Objectives

The objectives of the Grant Program are:
- To improve the quality of life of Richmond residents through a wide range of beneficial community group programs,
- To assist primarily Richmond based community groups to provide more beneficial programs, to more residents,
- To build community group capacity to deliver programs,
- To promote partnerships and financial cost sharing among the City, other funders and community groups.

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6. The Program Multiple Criteria

To maximize The City's Program benefits and limited funds, the following Criteria are established. Applications that meet these criteria will be favoured.

- Criteria A: Benefits To The Richmond Community
- Criteria B: Benefits To Applicant Groups [Program Clients]

MULTIPLE CRITERIA - CITY GRANT PROGRAM			
CRITERIA A - BENEFITS TO THE RICHMOND COMMUNITY			
General Objectives	**Group Assist Priorities**	**Types Of Residents Served**	**Priority Activities**
– Promote Livability	– Stable capable groups	– Primarily Richmond residents	– Prevention
– Promote Appealing	– Groups who form partnerships	– Seniors	– Intervention
			– Treatment
– Build A Legacy		– People with disabilities	– Wellness
– Build Sustainability		– Children	– Maximize the quality of funded services
– Build Financial Viability		– Youth	– Maximize the number of those helped.
– Build A Complete Community		– Families	– Build organizational capacity
– Promote "Well Managed"		– Low Income	– Build community capacity
– Promote Diversity		– Women	– Improve the quality of life:
– Promote Volunteerism		– Immigrants	• Social
– Promote Wellness		– Tourists	• Economic
– Innovation		– Other	• Environmental
– Other			– Sustainability
			– Other
CRITERIA B - BENEFITS TO APPLICANT GROUP			
General Priorities		**Less Favourably Considered**	
– Maximize quality of service		– Only City funding for project	
– Maximize number served		– Single Group & City funded projects	
– Promote financial partnerships		– Group becoming dependant on City grants	
– Leverage more funds from others		– Insufficient Partnering	
– Build organizational capacity		– Duplication of Service	
– Build community capacity		– Groups with unaccounted for surplus or deficit	
– Other		– Other	

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7. Interpreting The Program's Multiple Criteria
- The following tables clarify how the Multiple Criteria can be met.
- Applications are to indicate how.

CRITERIA A - BENEFITS TO THE RICHMOND COMMUNITY	
General Objectives	**Interpretation**
– Promote Livability	
– Promote Appealing	➤ Applications are to clearly address some of these criteria.
– Build A Legacy	
– Build Sustainability	
– Build Financial Viability	➤ Applications which promote volunteer participation and citizen
– Build A Complete Community	involvement are encouraged
– Promote "Well Managed"	
– Promote Diversity	➤ Innovation is encouraged
– Promote Volunteerism	
– Promote Wellness	
– Innovation	
– Other	
Group Assist Priorities	
– Stable capable groups	➤ Applications are to clearly address criteria.
– Groups who form partnerships	➤ Funding from other sources is expected.
– Other	
Types Of Residents	
– Serves primarily Richmond residents	➤ Applications must address at least one of these communities:
– Seniors	➤ Group program objectives must be stated.
– People with Disabilities	➤ Need: Applications are to:
– Children	▪ Demonstrate community need
– Youth	▪ Show financial need, and
– Families	▪ Demonstrate the impact that would occur if the City did not
– Low Income	fund the application.
– Women	➤ Maximize Benefits:
– Immigrants	Applications that provide the greatest benefits to the largest number
– Tourists	of Richmond residents are encouraged.
– Other	
Priority Activities	
– Prevention	
– Intervention	
– Treatment	
– Wellness	
– Maximize those helped	
– Build organizational capacity	
– Build community capacity	➤ Applications must address one of these types
– Improve the quality of life:	
• Social	➤ How the Group's program benefits people must be stated.
• Economic	
• Environmental	
– Sustainability	
– Other	

CRITERIA B - BENEFITS TO APPLICANT GROUP	
General Priorities	**Interpretation**
– Maximize quality of service	
– Maximize number served	➤ The Group's program benefits must be clearly stated. ➤ What the Group will do must be clearly stated. ➤ The City will favour applications that involve more partners.
– Promote financial partnerships	➤ How Group and/or resident capacity is built must be explained. ➤ Co-ordination: • Applications, which demonstrate co-ordination and co-operation with other groups to prevent the duplication of projects, programs, services or events, are favoured.
– Leverage more funds from others	➤ Multiple-Funded Project: • Applications, which provide evidence of having funding from a variety of sources, are favoured.
– Build organizational capacity	➤ "User Pay"
– Build community capacity	Where appropriate, projects that require that the users of the proposed program/ service pay some amount for the services are favoured.
– Other	
Less Favourably Considered	
– Only City funding for project	
– Single Group & City funded projects	
– Group becoming dependant on City grants	
– Insufficient partnering	➤ These programs will not be favoured.
– Duplication of service	
– Groups with unaccounted surplus or deficit	
– Other	

8. Policies

(1.) Program Phases and Considerations

The following Program phases and considerations are to be managed, monitored and improved, as necessary:

Program Phase	Who	Activity	Considerations
Phase 1	City staff	Prepare For Annual Grants	• Follow Program requirements • Promoting the Program

Phase 2	Applicant	Apply For A Grant	• Stability - of Group applying
			 • Capability – experience, reliability of Group
			 • Accountability - of Group
			 • Maximum benefits:
			   • Increased numbers served
			   • Of quality of service
			 • Degree of Need
			 • Most assisted per grant
			 • Cost effectiveness - of proposal
			 • Promote multiple partner funding & support
			 • Leverage of more funds from others
			 • Group's own support of their application:
			   • Funding
			   • Services,
			   • In-kind resources
			 • Thoroughness of proposal
			 • Clarity of proposal
			 • Amount of requested grant
			 • Benefits of any previous City grant

Phase 3	City staff	• Review applications • Make recommendations	Follow program requirements

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Program Phase	Who	Activity	Considerations
Phase 4	Council	• Reviews applications • Reviews staff recommendations • Considers any presentations • Awards Grants • Any referrals by Council regarding the grant recommendations will be addressed by staff and forwarded to Council	• Program Principles • Program Policies
Phase 5	City staff	Issues letters: • Awarded grants • Explaining denied grants	Follow program requirements
Phase 6	Applicant	Delivers funded service/program	Follow program requirements
Phase 7	Applicant	Monitors funded service/program	Follow program requirements
Phase 8	Applicant	Reports results to City: • Mid year, or • At end of service/program, or • When next applying for a grant.	Follow program requirements
Phase 9	City staff	Periodically: • Evaluates Grant benefits • Evaluates Grant Program • Proposes Program improvements	• Address Council instructions • Analysis • Options • Make recommendations
Phase 10	Council	• Reviews recommendations • Approves changes	Makes decisions
Phase 11	City staff	Implements program changes	Follow program requirements

(2.) Program Funding

a) Base Program Funding
- Until Council determines otherwise, $500,000 is available for the Program.
- Every five years beginning in 2013, Council will review base program funding.
- Council may increase or decrease the amount allocated to the Program, or keep it the same, based on overall City corporate priorities.

b) Annual Cost of Living Increase
- To maintain the effectiveness of Program base funding in light of general rising costs (e.g., the cost of living, fees), starting in 2009 and each year thereafter, an annual cost of living factor will be automatically added to the base program funding.
- The cost of living increase will be based on the Vancouver CPI annual average change as determined by BC Stats for the previous year.
- Finance Division of the City of Richmond will determine the amount annually and add it to the base program funding.

2009 Grant Program Funding	
Base Funding	$500,000 (reviewed every 5 yrs., beginning in 2013)
Consumer Price Index (CPI)	To be determined annually
TOTAL	$500,000 + CPI = New base program funding

c) Unused Program Funds
At the end of each year, any unallocated Grant Program dollars must be returned to the City's General Revenue Account.

(3.) Who Can Apply:
- Only registered non-profit groups.
- The Group's Board must approve of the application being submitted.

(4.) Who Cannot Apply
- Groups other than registered non-profit groups [e.g., for profit groups].
- Individuals, who do not represent a registered non-profit group.

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- Public and private schools including post secondary educational institutions, or groups seeking funding for school-based programs
- Pre-schools and child care providers [A separate City Child Care Grant Program exists].
- Agencies that provide grants.
- Others, as determined by Council.

(5.) Applications Per Year
Due to limited Program funds, only one application per Group/ per year will be accepted.

(6.) Application Deadline
The annual deadline for submitting City grant applications will be determined annually (e.g., on the second Friday of October).

(7.) Late Applications
Applications which miss the application deadline must not be accepted, processed or funded from the Grant Program for that application year, as:
- There is an ample annual application notice period for all.
- There are limited Program funds.
- The Program management phases are to be competed within a defined time period.
- Applicants desire a decision, as soon as possible.
- The processing of late applications would require that those applications that made the deadline be re-evaluated, thus delaying the process.
- Late applications may apply in the next year.

(8.) Benefits of Funding Proposal
To determine the benefits of funded group programs, the following qualitative and quantitative factors are considered:
- The quality and credibility of the group (e.g., accreditation, licenses).
- The purpose of the proposed program (e.g., prevention, treatment and wellness programs have inherent value).
- The quality of the program offered (e.g., sound practice followed, delivered by responsible people and professionals).
- The number of clients served.
- Evaluations of the program once delivered (e.g., client and participant letters, surveys; community acceptance; program evaluations).
- Benefits to the community at large.

(9.) Quality Of Documentation
- A quality, fully completed application has a better chance of receiving City funding (see chart below).

Quality Of Application	Comments
– Thoroughness of proposal	
– Clarity of proposal	➤ Applications are to clearly address criteria.
– Amount of requested grant and why	
– State proposed benefits of City grant	➤ Groups must be accountable.
– Capability of Group to deliver project	➤ Groups must demonstrate that they are capable.
– Applicants are to demonstrate financial partnerships and whether they have been: • Applied for, or • Already received	➤ Applications are to clearly and fully state funding details

- City staff have a limited amount of time to ask groups to clarify their applications.
- Applicants are required to address Grant Program Phases 2, 6, 7 and 8.
- Successful applicants are those who fully address all their Program Phases and requirements.
- Applicants are to provide documentation that addresses the Program Principles, Goals, Objectives, Multiple Criteria, Policies and requirements.

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- How well applicants do this thoroughly and with clarity, will affect the success of their application and their future applications.
- All application projects must have a specific set of goals, objectives, deliverables, clients and benefits.
- All funded activities must specify a start and finishing date.
- Documented authorization of the application by the Group's Board must be provided (e.g., Board resolution).
- All required documentation is indicated on the Grant Notice and Application.

(10.) Financial Considerations
- Applicants must submit:
  a) The Group's audited financial statements for the most recent completed fiscal year including the auditors report signed by the external auditors.
  b) If audited financial statements are not available, submit the reviewed financial statements for the most recent completed fiscal year along with the review engagement report signed by the external auditors.
  c) If neither audited nor reviewed financial statements are available, submit the compiled financial statements for the most recent completed fiscal year along with a compilation report signed by the external auditors
  d) If neither a, b, or c are available, financial statements for the most recent completed fiscal year endorsed by two signing officers of the Board of Directors
  e) The Group's current fiscal year operating budget.
  f) The Group's budget to support the application (e.g., Event, Project, Program or Operating Assistance budget).
- Group applications will be reviewed for financial accountability by Finance staff.

(11.) User Pay Principle
Applicants are encouraged to consider applying the "user pay" principle, where appropriate [e.g., users of the proposed service, program, or project would pay some of the cost].

(12.) Less Favourably Considered Applications
Applications which are less favoured, are those which:
- Rely only on City funding
- Are funded by a single Group and the City
- Risk the Group becoming dependant on City grants
- Demonstrate insufficient partnering
- Duplicate existing services
- Other

(13.) Staff Review Of Applications
- Staff are to administer the Program based on the Program Principles, Goals, Principles, Objectives, Multiple Criteria, Policies and Requirements.
- As staff review applications, they may contact the applicants and others, to clarify the proposals.
- As it is Council who makes the final grant decisions, while reviewing applications, staff are not to advise applicants regarding:
  - Whether or not they will receive a grant, or
  - The possible amount of a grant.

(14.) Funding Streams
- To facilitate comparisons, staff will categorize the applications as follows:
  - Services (e.g., Health, Social and Safety), and
  - Events (e.g., Cultural and Community).

- Staff will provide information to Council regarding the total amount requested and recommended in each category as part of the annual grants review report.

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(15.) Purposes Eligible for Funding
Grants may be used for the following purposes:

1. **Operating Assistance**
    Regular operating expenses or core budgets of established organizations, including supplies and equipment, heat, light, telephone, photocopying, rent, and administrative support salaries.

2. **Community Service (e.g., program, project)**
    Must respond to the program criteria, have specific goals and objectives, and have a defined start and finish date.

3. **Community Event**
    Must respond to the program criteria, have specific goals and objectives, and have a defined start and finish date.

(16.) Items Eligible For Funding
The eligible items which may be funded are those required to directly deliver the project, including, including regular Group operating expenses or program/project specific expenses, including:
- Professional and administrative salaries and benefits
- Consultant services to deliver the project
- Office rent
- Supplies
- Equipment
- Rentals [e.g., vehicles, equipment, and maintenance]
- Heat
- Light
- Telephone
- Photocopying
- Materials

(17.) Items Not Eligible For Funding
Grants are not for:
- Debt retirement
- Land and land improvements
- Building construction and repairs
- Retroactive funding
- Operating deficits
- Proposals which primarily fund or award other groups
- Political activities including:
    - Promoting or serving a political party or Group,
    - Lobbying of a political party, or for a political cause,
- Activities that are restricted to or primarily serve the membership of the organization, unless group membership is open to a wide sector of the community (e.g., women, seniors) and is available free-of-charge or for a nominal fee that may be reduced or exempted in case of need.
- Expenses that may be funded by other government programs or entities
- Annual fund-raising campaigns, form letter requests or telephone campaigns
- Expenses related to attendance at seminars, workshops, symposiums, or conferences
- Public and private school based programs
- Other, as Council may determine.

(18.) Grant Allocation Considerations
- In reviewing grant applications, preparing recommendations and making grant decisions, primary consideration is given to meeting the Program Principles, Goals, Objectives, Multiple Criteria, Policies and Requirements including:
    - Demonstrated organizational efficiency, effectiveness and stability
    - The number of Richmond residents served
    - The quality of service

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- The financial need of the Group
- The proposed community interaction
- The role and number of volunteers
- The use of existing community services and facilities
- Unique nature – not a duplication of service
- Applying to more than one funding source
- Other City programs, services and financial assistance already provided
- Grant allocations are partially dependent on the annual Program budget.
- The value of any other City support (e.g., space, photocopying, staff services) that the Group receives may affect the amount of grant awarded.
- Not all groups meeting the Program requirements will necessarily receive a grant.
- Based on the number of applications, groups may not receive the full grant that they request, but only a portion of it.
- Grants are not to be regarded as an entitlement.
- Approval of a grant in any one year is not to be regarded as an automatic ongoing source of annual funding.
- As Council wishes to maximize benefits from the Grant Program, the assessment of City Grant applications is flexible.

(19.) Timing Of Grant Decisions

Generally, Council will decide on the applications in the first quarter of the year; however, no specific date is set to allow for processing, budget and timing.

(20.) No Interim Funding

There is to be no interim funding of a group or its application while it waits to hear if its application is approved, as such would delay application review times and final decisions.

(21.) Council Decision

- Council will make the final grant decisions, at its sole discretion, based on the Program Goals, Principles, Multiple Criteria, Policies and Requirements, and a review of City staff recommendations.

- Council may:
  - Approve a funding application:
    - In total, with or without conditions (e.g., subject to a mid-year review)
    - In part, with or without conditions
  - Ask for more information
  - Issue dollars in phases with conditions
  - Deny an application.

- For example, where a large amount of grant money is to be provided, or where Council is not familiar with the proposed program, Council may:
  - Issue the program dollars in phases, and
  - Request additional information (e.g., mid-year reviews) to ascertain program benefits prior to issuing any additional program dollars.

- If an application is not funded by Council, it is deemed to be denied.

(22.) Recuperation of Grant

Should the funds not be used for the stated purpose, the applicant is to automatically return them to the City.

(23.) No Appeal

There is no appeal to Council's decision, due to the high number of applications for limited Grant Program funding, and as applicants may apply in the next year.

(24.) Reporting of Grant Benefits

Those who receive a City grant are required to demonstrate the benefits of their program, by providing:

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- A statement of program purpose
- Program evaluations (e.g., by group, or independent sources)

Groups are required to demonstrate program benefits in several ways:
- When they apply, by providing information regarding anticipated program benefits,
- After they receive a grant; at the year end and before applying again, by providing information regarding the program benefits including evaluation results

On a random basis, mid-year progress and financial reports will be requested.

(25.) Program Review
- The Program will be reviewed annually by staff after the grants have been awarded for that year.
- Council may change the Program at any time.

(26.) Program Support Documents - see Attached
To facilitate Program administration, a variety of documents may be used and modified from time to time by staff, including:

ATTACHMENT A	GRANT PROGRAM APPLICATION NOTICE
ATTACHMENT B	GRANT PROGRAM APPLICATION FORM
ATTACHMENT C	AN INTERNAL STAFF CHECKLIST TO SUMMARIZE ANNUAL GRANT APPLICATIONS
ATTACHMENT D	GRANT APPLICATION SUMMARY SHEET (FOR COUNCIL)

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City of Richmond 6911 No. 3 Road Richmond, BC V6Y 2C1 (604) 276-4000 www.richmond.ca	**Grant Program Application Notice**

Grant Application Forms are available from the **Information Counter at Richmond City Hall, or on the City's Website at www.richmond.ca.**

Please read the 2008 Richmond Grant Program, and these instructions, before completing the application form.

❑ **SUBMISSION REQUIREMENTS**

1. Please complete the form thoroughly.

2. Please ensure that your application includes the following documents:

   ❑ A list of the Group's Board of Directors, Officers and Executive Directors including addresses and contact information.
   ❑ Financial Statements
   a. The Group's audited financial statements for the most recent completed fiscal year including the auditors' report signed by the external auditors, OR one of the following alternatives:
   b. If audited financial statements are not available, submit the reviewed financial statements for the most recent completed fiscal year along with the review engagement report signed by the external auditors.
   c. If neither audited nor reviewed financial statements are available, submit the compiled financial statements for the most recent completed fiscal year along with a compilation report signed by the external auditors
   d. If neither a, b, or c are available, financial statements for the most recent completed fiscal year endorsed by two signing officers of the Board of Directors
   e. The Group's current fiscal year operating budget.
   f. The Group's proposed grant use budget (e.g. Event, Project, Program or Operating Assistance budget).

   ❑ A resolution by the Group's Board of the application being submitted.
   ❑ If a City grant was received in the previous year, include the results to show community benefit (See #10 Measuring Community Benefits).

3. Submissions should be on letter-size paper, single-sided and three whole-punched.

4. Please include documentation that specifically supports your request. Please do not include general information that does not pertain directly to your application, e.g., promotional brochures, annual reports, etc.

5. Send **four complete sets of documentation (original plus three copies)** to the **Information Counter** at Richmond City Hall by the stated deadline.

6. Submissions that do not contain complete financial and budgetary information will be considered incomplete and will not be accepted.

7. **Note: Late submissions will not be considered.**

2474630   **Application Deadline:** _____

❏ **APPLICATION PROCESS**

1. If you have general questions regarding your application, please contact Lesley Sherlock, Social Planner, Policy Planning Division, City of Richmond at (604) 276-4220.

2. As part of the review process, a member of the City Staff Grants Review Committee may contact you for further information.

3. Decisions regarding funding allocations within the City Grants Budget rest with Richmond City Council.

4. Following Council approval of the Grants Budget, each applicant will receive notification of Council's decision pertaining to the application.

5. The annual review and allocation of City grants may take three to six months.

6. **Please submit your application by (date, time)_____ to:**

The Information Counter
(City Grant Applications)
Richmond City Hall
6911 No. 3 Road
Richmond, BC V6Y 2C1

City of Richmond Vision

The Vision statement for the City of Richmond is meant to provide a clear image of where the City is heading over the next decade or two.

Non-profit groups are integral to the City achieving this vision.

This application asks that your group identify how your grant proposal contributes to the achievement of this vision.

> **Our Vision is....**
>
> *"For the City of Richmond to be the most appealing, livable, and well-managed community in Canada".*

APPLICANTS ARE REQUESTED TO PLEASE:

1. **COMPLETE THE FOLLOWING APPLICATION FORM**

AND

2. **ATTACH SUPPORTING INFORMATION, AS NECESSARY.**

3. **APPLICATION DEADLINE** _____
4.

Application Deadline: _____

GRANT APPLICATION FORM

1. IDENTIFICATION OF APPLICANT GROUP

Please attach written approval by the Group's Board to submit this application.
Group Name:
BC Society Registration Number:
Revenue Canada Charitable Group Number: [If applicable]
Contact Person:

Mailing Address	
PO Box	
Street	
City	
Postal Code	
Contact Phone:	Contact Fax:
Contact Email:	
Web Site Address	

This Grant Application is for (please check):	
A. **Primary Purpose** ❑ Group Operating Assistance, and/or ❑ A Community Service (e.g., Event, Program, Project) B. **Duration of Activity** ❑ An Ongoing Activity, and/or ❑ A One time Activity Start date:　　　　End date:	Amount of City Grant Requested $_____
Please describe specifically how the City's grant will be used:	

Application Deadline: _____

Previous Year's Grants	
Amount Received $_____ **Year** _____	Did you receive a grant last year? ☐ No ☐ Yes If Yes: Group Name: _____
Amount Received $_____ **Year** _____	Did you apply and receive a City Grant under any other name in the last 5 years? ☐ No ☐ Yes If Yes: Group Name: _____

2. **DESCRIBE YOUR GROUP**

(1) Please attach:
- Your history
- Your Group's Purpose, Vision, Goals, Objectives (include organizational chart if available)
- Board of Directors' names, positions and addresses, identifying officers
- Primary administrator (e.g., Executive Director) contact information.

(2) This grant request will be used for the following staff and/or volunteers:

Staff	Number	Avg. Hrs/Week
Full-time employees		
Part-time employees		
Volunteers (excluding board members)		

(3) How many people does your Group serve? _____

(4) How many Richmond residents does your Group serve? _____

3. **YOUR GROUP'S FINANCIAL INFORMATION:**

(1) Please attach the following information for your Group:

☐ **Group's Past Audited Financial Statements**
- Include an Income Statement and Balance Sheet;

☐ **Group's Proposed Current Year Operating Budget**
- Include projected statements of expenses and revenues; and,

☐ **Group's Proposed Event / Project / Program Application Budget**
- Include projected revenues and expenses.

Application Deadline: _____

(2) Please complete the following **Group Total Annual Budget Summary Table.**

GROUP TOTAL ANNUAL BUDGET SUMMARY TABLE		
For All Activities Of The Group	**Most Recent Completed Year** (e.g., Audited Financial Statement)	**Current Year**
Total Group Revenue	Year: _____ Amount $	Year: _____ Amount $
Total Group Expenses	Year: _____ Amount $	Year _____ Amount $
Any Total Accumulated Group Surplus?	Year: _____ No ☐ Yes ☐ Amount $	Year: _____ No ☐ Yes ☐ Amount $
Any Total Accumulated Group Deficit?	Year: _____ No ☐ Yes ☐ Amount $	Year: _____ No ☐ Yes ☐ Amount $
Please detail and explain any total accumulated Group surplus, or deficit.		

4. **MOST RECENT CITY GRANT [if applicable]**

    (1.) I f your Group received a City grant from Richmond last year, please **detail** specifically how the grant monies were spent.

    _____

    _____

    _____

    (2.) P lease indicate if there was a surplus from the City grant money.
    ☐ NO
    ☐ YES   If YES: How much? $_____   What year? _____

    (3.) I f yes, why was there a surplus from the City grant money and how do you plan to spend it?

    _____

    _____

    _____

    (4.) A ttach outcome measurement results (see #10). If the grant goals & objectives have changed since your previous application, or were not met, please indicate why.

    _____

    _____

    _____

Application Deadline: _____

5. PROPOSED GRANT BUDGET

PROPOSED GRANT BUDGET SUMMARY		
DETAILS OF ITEMS REQUESTED FOR CITY GRANT FUNDING	Amount	% Of Budget
Professional and administrative salaries and benefits (full time)		
Professional and administrative salaries and benefits (part time)		
Consultant services		
Office rent		
Supplies		
Equipment		
Rentals [e.g., vehicles, equipment, and maintenance]		
Heat		
Light		
Telephone		
Photocopying		
Materials		
Other (please specify)		
TOTAL REQUESTED		100%

6. GRANT PROPOSAL FUNDING PROFILE
(1.) If applicable, please complete the following table.

GRANT PROPOSAL FUNDING	AMOUNT	% OF TOTAL BUDGET	CONFIRMED	
			YES?	NO?
Total Operating Assistance, Community Service (e.g., Event, Program or Project) **Cost**	$			
Total Amount Provided By Your Group	$	%		
Total Amount To Be Provided From All Other Funders [Please complete 6 (2) below]	$	%		
Total Amount Of City Grant Requested	$	%		
TOTAL		100%		

(2.) Financial Assistance From Other Sources
If your Group is applying for funding from other sources (e.g., other grants, donations, financial assistance or sponsorships) regarding this grant proposal, please detail below.

Funder Name 1

Amount

Details: How used?

_____

_____

_____

2474630   **Application Deadline:** _____

Funder Name 2 _____

Amount _____

Details: How used? _____

_____

_____

Funder Name 3 _____

Amount _____

Details: How used? _____

_____

_____

7. USER PAY PRINCIPLE

Will the people you intend to serve with the proposed program or service pay some fee to receive it?

☐ YES: If Yes How much? $_____, per person, Group

☐ NO: Why?

_____

_____

8. OTHER CITY OF RICHMOND SUPPORT RECEIVED

Please itemize any services that your Group receives from the City of Richmond (e.g. use of City facility, subsidized rents, property tax relief, photocopying, staffing etc.):

Type Of City Support	Estimated Value $	Please provide details
(Example: Free rental space)	$50 / evening	Rental fee waived for 10 weeks = $500
TOTAL		

9. COMMUNITY NEED

Have you determined that there is a need in the community for this particular operating expense, program, etc.? ☐ YES   ☐ NO

If yes, describe the method used to establish need and the results.

_____

_____

_____

_____

_____

_____

Application Deadline: _____

10. **PLEASE SPECIFY WHICH RICHMOND RESIDENTS YOUR GRANT APPLICATION WILL SERVE**
    Using the table below, please identify whom your application will benefit.

Grant Clients	Name Target Group [if appropriate] / Specify	How Many Totally Served?	How many are Richmond residents?
Primarily Richmond residents			
Seniors			
People with Disabilities			
Children			
Youth			
Families			
Low Income			
Women			
Immigrants			
Tourists			
Other			

11. **IDENTIFY PROPOSED GRANT USE GOALS, OBJECTIVES, DELIVERABLES AND OUTCOME MEASUREMENTS**
    Please complete the table and attach information, as necessary:

GOALS What you hope to achieve	OBJECTIVES How will you achieve the goals?	DELIVERABLES What specific activities will you undertake to achieve the objectives?	OUTCOME MEASUREMENT How will you measure results (e.g., statistics, surveys)?

Application Deadline: _____

12. IDENTIFY <u>HOW</u> YOUR GRANT PROPOSAL WOULD BENEFIT RICHMOND RESIDENTS

Please complete the checklist and attach information, as necessary:

Criteria A - Benefits To Community	CRITERIA MET?		COMMENTS
	YES	NO	
❑ **General Objectives**			
Promote Livability			
Promote An Appealing City			
Build A Legacy			
Build Sustainability			
Build Financial Viability			
Build A Complete Community			
Promote "Well Managed"			
Promote Diversity			
Promote Volunteerism			
Promote Wellness			
Innovation			
Other			
❑ **Group Assist Priorities**	YES	NO	
Stable capable groups			
Groups who form financial partnerships			
Other			
❑ **Types Of Residents**	YES	NO	
Primarily Richmond residents			
Seniors			
People with disabilities			
Children			
Youth			
Families			
Low Income			
Women			
Immigrants			
Tourists			
Other			
❑ **Priority Activities**	YES	NO	
Social			
Prevention			
Intervention			
Treatment			
Wellness			
More people helped			
Maximize those helped			
Build organizational capacity			
Build community capacity			
Improve the quality of life:			
• Safety			
• Arts			
• Culture			
• Heritage			
• Other			
Economic			
Environmental			
Sustainability			
Other			

Application Deadline: _____

Criteria B - Benefits To Applicant Group	CRITERIA MET?		HOW?
	YES	NO	
☐ General – Does Your Application?			
Maximize the quality of service			
Maximize the number of people served			
Promote financial partnerships			
Leverage more funds from others			
Build organizational capacity			
Build community capacity			
Other			

13. SUPPORT FROM PARTNERS

(1) Please identify any groups that you propose to partner with, to deliver and ensure the success of your proposed grant use:

Group (Partners may be contacted for clarification)	Role/Activity [e.g., administrative, supervision, leadership] [There should be no duplication of roles]
Supporting Group 1	
Group Name:	
Contact Name:	
Position In Group:	
Telephone Number	Business: Cell:
Supporting Group's Roles and Activities	☐ ☐ ☐

Application Deadline: _____

Supporting Group 2	
Group Name:	
Contact Name:	
Position In Group:	
Telephone Number	Business: Cell:
Supporting Group's Roles and Activities	☐ ☐ ☐

Supporting Group 3	
Group Name:	
Contact Name:	
Position In Group:	
Telephone Number	Business: Cell:
Supporting Group's Roles and Activities	☐ ☐ ☐

(2) Please provide documentation (e.g., letters, e-mail) from your partners indicating the role they will play if the funding is received.

14. YOUR APPLICATION
Please submit **FOUR COMPLETE SETS OF DOCUMENTATION (ORIGINAL PLUS THREE COPIES)** of your application including cover letter and attachments.

15. VERIFYING YOUR APPLICATION
Please verify the information provided in this application by signing below and including documentation of your Board's resolution to approve the application.

Application completed by:	
Name	
Title	
Signature	
Board Approval	
Board Chair Name	
Date of Board Approval	
Signature	

Application Deadline: _____

HAVE YOU

> COMPLETED THE FORM?
> ATTACHED SUPPORTING INFORMATION, AS NECESSARY?
> ATTACHED ALL REQUIRED DOCUMENTS (SEE SUBMISSION REQUIREMENTS, p. 1)

PLEASE DO NOT ATTACH BULKY PACKAGES

APPLICATION DEADLINE: OCTOBER xx, 2008

2474630   **Application Deadline:** _____

AN INTERNAL STAFF CHECKLIST

Part 1: SUMMARY CHECKLIST FOR EACH ANNUAL GRANT APPLICATION

1. Applicant: _____

2. Name Of Project: _____

3. Date Received: _____

4. Late Application? _____ Late By: _____Months_____Days

5. Focus?   ☐ A Service (e.g., Health, Social, Safety)   ☐ An Event (e.g., Cultural, Community)

6. Meet Criteria?

Criteria A - Benefits To Community	CRITERIA MET?		COMMENT
	YES	NO	
☐ **General Objectives**			
Promote Livability			
Promote Appealing			
Build A Legacy			
Build Sustainability			
Build Financial Viability			
Build A Complete Community			
Promote "Well Managed"			
Promote Diversity			
Promote Volunteerism			
Promote Wellness			
Innovation			
Other			
☐ **Group Assist Priorities**			
Stable capable groups			
Groups who form partnerships			
Other			
☐ **Types Of Residents**			
Serve primarily Richmond residents			
Seniors			
People with Disabilities			
Children			
Youth			
Families			
Low Income			
Women			
Immigrants			
Tourists			
Other			
☐ **Priority Activities**			
Social			
Prevention			
Treatment			
Wellness			
More people helped			
Maximize those helped			
Build organizational capacity			
Build community capacity			
Improve the quality of life			
Safety			
Arts			
Culture			
Heritage			
Other			
Economic			
Environmental			
Sustainability			
Other			

Criteria B - Benefits To Applicant Group	CRITERIA MET?		Comments
☐ General	YES	YES	
Maximize quality of service			
Maximize number served			
Promote partnerships			
Leverage more funds from others			
Build organizational capacity			
Build community capacity			
Other			
☐ Criteria C Grants Less Favourably Considered			
Only City funding for project			
Single Group & City funded projects			
Group becoming dependant on City grants			
Insufficient partnering			
Duplication of service			
Other			
☐ Criteria D APPLICATION VERIFICATION			
Authorized by Board			
Date of Authorization given			

Part 2: STAFF RECOMMENDATION

1. Comments On Application

2. Requested Amount:_____

3. Recommended Amount:_____

4. Decision

Yes because

Yes, with conditions

No because

5. All documentation submitted?   ☐ Yes   ☐ No

6. Reviewer

Name_____

Title_____

Email _____   Phone _____

2438700

Grant Application Summary Sheet

	City of Richmond	200__ Grant Application Summary Sheet	
1	Applicant	✪	
2	Grant Request	$✪	For:
3	Summary of Request		
4	Focus	❑ A Service (e.g., Health, Social & Safety) ❑ An Event (e.g., Cultural, Community)	

5	MULTIPLE CRITERIA - CITY GRANT PROGRAM

CRITERIA A - BENEFITS TO THE RICHMOND COMMUNITY

General Objectives	Group Assist Priorities	Types Of Residents	Priority Activities
❑ Promote Livability	❑ Stable capable groups	❑ Serve primarily Richmond residents	❑ Prevention
❑ Promote Appealing	❑ Groups who form partnerships	❑ Seniors	❑ Intervention
❑ Build A Legacy		❑ People with Disabilities	❑ Treatment.
❑ Build Sustainability		❑ Children	❑ Wellness
❑ Build Financial Viability		❑ Youth	❑ Maximize the quality of funded services
❑ Build A Complete Community		❑ Families	❑ Maximize the number of those helped.
❑ Promote - "Well Managed"		❑ Low Income	❑ Build organizational capacity
❑ Promote Diversity		❑ Women	❑ Build community capacity
❑ Promote Volunteerism		❑ Immigrants	❑ Improve the quality of life:
❑ Promote Wellness		❑ Tourists	• Social
❑ Innovation		❑ Other	• Economic
❑ Other			• Environmental
			❑ Sustainability
			❑ Other

CRITERIA B - BENEFITS TO APPLICANT GROUP

General Priorities	Less Favourably Considered
❑ Maximize quality of service	❑ Only City funding for project
❑ Maximize number served	❑ Single Group & City funded projects
❑ Promote financial partnerships	❑ Group becoming dependant on City grants
❑ Leverage more funds from others	❑ Insufficient Partnering
❑ Build Capacity of Organizations	❑ Duplication of service
❑ Other	❑ Groups with unaccounted surplus or deficit
	❑ Other

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Grant Application Summary Sheet continued

6	Number of Richmond residents served by Group	✪	
7	Services received from City	Value $ **Please detail**	
8	Amount of Previous Year Grant and Spending Details	$✪ **Please detail**	

	YOUR GROUP'S TOTAL BUDGET	Most Recent Completed Year (e.g., Audited Financial Statement)	Budget for Current Year
9	Total Revenue	$ ✪	$ ✪
	Total Expenses	$ ✪	$ ✪
	Surplus or (Deficit)	$ ✪	$ ✪
	Accumulated Surplus or (Deficit)	$ ✪	$ ✪
	Justification for any Accumulated Surplus (Deficit)	Please detail ✪	Please detail ✪

	GRANT FUNDING PROFILE	Most Recent Completed Year	This Application
10	Richmond Grant	$ ✪	$ ✪
	Other Grants (Federal, Provincial, Municipal)	$ ✪	$ ✪
	Total Grants	$ ✪	$ ✪
	Grant Surplus	$ ✪	$ ✪
	Justification for Accumulated Surplus (Deficit) Involving Previous City Grant	Please detail ✪	Please detail ✪

	PROPOSED CITY GRANT BUDGET	This Application
11	☐ OPERATING ASSISTANCE	For A- $ ✪ For B- $ ✪ For C- $ ✪ Total - $ ✪
	☐ COMMUNITY SERVICE (E.G., EVENT, PROGRAM, PROJECT)	For A- $ ✪ For B- $ ✪ For C- $ ✪ Total - $ ✪
	☐ Total Grant Revenue	$_____
	☐ Total Grant Expense	$_____
12	Recommended Grant	For A- $ ✪ For B- $ ✪ For C- $ ✪ Total - $ ✪
13	Conditions / Comments	
14	Reason	This grant is provided or not provided because: Please detail ✪
15	Assessor	

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City of Richmond

Report to Committee

To:	General Purposes Committee	**Date:** May 5, 2008
From:	Joe Erceg, MCIP	**File:**
	General Manager, Planning and Development	
Re:	**2008 Richmond City Grant Program**	

Staff Recommendation

That, as per the report entitled "2008 Richmond City Grant Program", dated May 5, 2008, the proposed 2008 City Grant Program Application Form be circulated to the Richmond Community Services Advisory Committee and the Richmond Communities Committee for comments, prior to consideration of final Program approval.

Joe Erceg, MCIP
General Manager, Planning and Development

Att. 2

FOR ORIGINATING DEPARTMENT USE ONLY		
ROUTED TO: CONCURRENCE	**CONCURRENCE OF GENERAL MANAGER**	
Budgets ....Y ☑ N ☐		
Recreation & Culture ....Y ☑ N ☐		
REVIEWED BY TAG YES ☑ NO ☐	**REVIEWED BY CAO** (Acting) YES ☑ NO ☐	

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Staff Report

Origin

On March 13, 2006 Council resolved:

> *"That a Committee comprised of appropriate staff and City Councillor Evelina Halsey-Brandt, with Councillor Linda Barnes as the alternate, be established to review Policy 3705 (the Grant Policy) to ensure it reflects the needs of the community."*

This report presents the results of the policy review and a proposed 2008 City Grant Program for Council's consideration.

Findings Of Fact

A City Grant Program review team consisting of Councillor Evelina Halsey-Brandt, Councillor Linda Barnes and City staff identified the following components to be addressed in the review: the existing City Grant Program, established in 2002 (**Attachment 1**); future administration of the City Grants Program; and funding requests outside the City Grants process.

Attachment 2 contains the existing grant application and staff summary sheet forms. They are presented for comparison purposes with those of the proposed Grant Program.

Analysis

The goal of the review was the preparation of an improved program. Community benefits, cost effectiveness, accountability, and applicant and administrative ease were emphasized.

1. Policy 3705, "Grants Program"

The following City Grant Program policies were reviewed: program principles, goals and objectives, program criteria, eligibility, applicant documentation, financial accountability, other City services offered, the review process and program funding.

The proposed 2008 City Grant Program is provided in **Attachment 3**. A brief summary of the review follows.

(1) Grant Program Principles, Goals and Objectives

Program principles, consistent with those in the existing policy, have been enhanced. A program goal and objectives have been added for greater clarity.

(2) Program Criteria

The existing program criteria is not sufficiently comprehensive. Multiple program criteria have been identified to assist with implementation, based on the benefits to the Richmond community

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(general objectives, group assists, type of residents, and priority activities), and the benefits to the applicant group (general priorities and less favourably considered proposals).

These criteria provide improved clarity to the applicant, staff and Council regarding proposed applications and their benefits.

(3) Grant Eligibility

<u>General Eligibility</u>
Clarification regarding Grant eligibility is provided by better distinguishing between who is eligible (Sections 2 & 3), and what uses are eligible (Sections 13 & 14).

The purposes that are eligible for funding have remained the same: Operating Assistance; Ongoing Programs; One-time Projects; Community Events, and Other (at Council discretion).

<u>Categories of Eligibility</u>

In the existing policy, two categories of eligibility are identified:
<u>Category 1 Applicants [Ongoing Annual Funding]</u>
- Applicants must be deemed to be providing unique and essential services to the community of Richmond.
- Applicants must demonstrate how their services fit under this designation.
- Applicants who are deemed to be Category 1 may apply for funding in subsequent years.

<u>Category 2 Applicants [Funding Only Every Three Years]</u>
- One-time-only projects which respond to health, social and cultural needs within Richmond.
- Applicants who receive funding would not be eligible to apply or receive funding for two subsequent years, as follows:

Year 1	Can apply; Grant Issued
Year 2	Cannot apply
Year 3	Cannot apply
Year 4	Can apply

In the proposed program, these categories have been removed because they are difficult to define and implement, and have proven to be not that useful. Considering a wide range of applications annually best allows Council to respond to annual community needs.

<u>Exclusion from Eligibility</u>
The current policy excludes "activities which are restricted to people of specific religious or ethnic groups". To avoid eliminating applications that are delivered by religious or ethno-cultural groups that benefit the community (not just the group itself), this exclusion has been removed.

A new category of exclusion has been added, namely, "activities that are restricted to or primarily serve the membership of the organization". This criteria will apply to all organizations (e.g., sports, arts, religious, ethno-cultural). This exclusion does not apply if group membership

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is open to a wide sector of the community (e.g., women, seniors) and is available free-of-charge or for a nominal fee that may be reduced or exempted in case of need.

(4) Documentation

The proposed program expands on and clarifies the quality and nature of documentation required. This will help to ensure a consistent, high quality of documentation in the applications.

The mid-year reporting on progress of the recipient's use of grant funds will no longer be required because it is deemed unnecessary and increases staff work. However, a mid-year review will be requested on a random basis. The full reporting on the use of grant funds is a requirement by the group at its fiscal year-end, or is required in the next Grant Program application, if applying for another grant.

An additional requirement in this revised program is for documented authorization of the application by the group's Board (e.g., Board resolution).

(5) Financial Accountability

Program financial statement policy requirements were reviewed by Finance staff and have been strengthened. To further ensure financial accountability, applications will be reviewed by Finance staff as part of the application review process. This may lengthen the application review process by at least one month, but is considered necessary to ensure accountability.

(6) Other City Services Offered

Non-profit societies may receive a range of benefits from the City (e.g., nominal lease agreements, tax exemptions, meeting spaces, staff support). Applicants are now required to report all City supports received, including their estimated monetary value.

(7) Program Management Phases

The administrative phases of the program, including the annual grant application process and the corresponding activities/considerations, are identified. This will clarify the process for applicants who may not be familiar with the grant application review process and time-frame, as well as for City staff and Council.

(8) Program Funding

Overall Budget
The current Grants budget is $500,000. The source of funding is Casino revenues; the Grant budget represents 4.5% of the $11,000,000 total budgeted Casino revenue. The remaining Casino funds are allocated to funding RCMP Officers (4), City Reserves, the 2010 Speed Skating Oval, and Major and Minor Capital Projects.

Any unallocated Grant Program funds remain in the Grants Program account until December 31st of each year. If unused, the funds are absorbed back into General Revenue.

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For the future funding of the Grant Program, see "Financial Considerations" below.

Funding by Categories
The following table indicates the amount requested and approved by Council at the annual presentation of the Grants Program, as well as additional funding provided to groups requesting assistance outside of the Grant cycle that is charged to the Grant budget. Amounts are provided for the two broad grant streams: 1. Health, Social and Safety Services, and 2. Cultural and Community Events.

Year	2001	2002	2003	2004	2005	2006	2007	2008
a. Total Grant Budget	$316,500	$316,500	$316,500	$316,500	$500,000	$500,000	$500,000	$500,000
b. Health, Social, Safety Grants	$249,200	$252,200	223,750	199,500	374,450	412,950	430,500	429,250
c. Cultural & Community Event Grants	$67,300	$64,300	70,000	69,600	92,100	66,700	69,500	70,750
d. Total Grant Program (b+c)	$316,500	$316,500	$293,750	$269,100	$466,550	$479,650	$500,000	$500,000
e. Additional expenditures (outside of Grant Program)	0	$10,000	$85,000	0	$8,500	$3,970	0	0
f. Total Annual Expenditure	$316,500	$326,500	$378,750	$269,100	$475,050	$483,620	$500,000	$500,000
g. Total Requested	$678,752	$483,398	$785,038	$683,362	$1,248,032	$721,935	$960,361	$1,385,381
h. Difference between d & e	$362,252	$156,898	$406,288	$414,262	$772,982	$238,315	$460,361	$885,381

The majority of Grant Program funding has always been allocated to groups applying for funding under the "Health, Social and Safety Services" category. From 2001 – 2004, an average of 78% per annum went to this category; this increased to an average of 84% from 2005 – 2008, when the Grant Program budget increased. The majority of the increase ($171,950 of $183,500) went to Richmond Addiction Services during this period.

The following table indicates the amounts allocated as part of the Grant Program ("d" in the above table) by the purpose of the request:

Year	2001	2002	2003	2004	2005	2006	2007	2008
a. Operating Assistance	114,700	20,100	71,250	147,200	88,700	79,700	108,000	86,100
b. Programs and Services	67,000	142,600	73,000	53,500	228,950	316,450	256,450	285,150
c. Both a and b identified	126,800	147,600	77,000	none	73,000	57,500	66,150	65,500
d. Projects	0	700	63,000	60,000	58,200	17,000	57,900	50,000
e. Events	8,000	5,500	9,500	8,400	17,700	9,000	11,500	13,250
f. Other (Council discretion)	0	0	0	0	0	0	0	0
g. Total	$316,500	$316,500	$293,750	$269,100	$466,550	$479,650	$500,000	$500,000

Variations are generally attributable to groups' changing the designation of their request from year to year (e.g., Community Association Summer Project applications were sometimes identified as projects, and sometimes as programs). The large increase in "Programs and Services" from 2005 on is due to the $171,950 grant provided to RAS.

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In addition to the above amounts, the City budgeted $156,896 in the 2008 budget for various programs that would otherwise fall under the Grant Program (Disability Resource Centre, $70,000; Richmond Committee on Disability, $40,496; Equestrian Therapeutic Society, $46,400).

2. Application Form

The Grant Application Form has been revised to reflect changes in the Grant Program, particularly with respect to clarifying information requirements, proposal benefits and the proposed use of funds.

This clarification will assist at all stages of the grant application review process, including application preparation, staff review and Council decision making.

Application Testing
Three community agencies (Touchstone, Richmond Family Place and the Richmond Women's Resource Centre) were asked to review the proposed draft application form and provide suggestions. Comments included that the proposed application clarifies expectations, provides more direction, helps groups to identify the benefits of their work, and is more user-friendly. Each made suggestions for clarification that have been incorporated into the proposed program.

3. Future Administration of 2008 City Grants Program

It is recommended that the 2008 City Grants Program continue to be managed internally. An outside administrator will not be sought. This arrangement will save time, administration (e.g., double-checking), and enable Council to continue its full control of the program.

4. Funding Requests outside the City Grants Process

Outside of the City Grant process, ad hoc requests tend to occasionally arise due to a range of circumstances (e.g., provincial funding changes, tax increases).

Groups seeking City assistance outside of the Grant Program (e.g., missed the deadline) may make a submission to the City including all relevant administrative, program and financial information. Complete group financial documentation and Board approval of the request will be required. Other information required to support the requests may vary based on the nature of the request. Council may consider and reject or approve such requests, subject to Council priorities and available funding.

5. Suggestions from the 2003 RCSAC "Social Services in Richmond" Report

In 2003, the Richmond Community Services Advisory Council (RCSAC) presented a report to Council, "Social Services in Richmond: A Social Services Inventory and Analysis".

As part of this report, the RCSAC made the following suggestions regarding the City Grant Program:
- provide greater stability in funding for social service agencies by entering into longer term agreements,

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- continue to support operating expenses and infrastructure funding,
- remove "innovative approaches" as a principle of funding,
- remove the need for evidence of funding from a variety of sources, and
- make it possible to apply electronically for the City Grants Program.

The proposed Grant Program criteria emphasizes that groups are not to become dependent on City grants or rely exclusively on City funding. Therefore, the revised program does not accommodate the request for longer term agreements or remove the need to seek funding from a variety of sources. The proposed Grant Program continues to exclude major capital expenses (e.g., infrastructure improvements) as eligible items.

RCSAC suggestions that have been incorporated are that: (1) the program will continue to support operating expenses, this being a particularly valuable contribution to community services delivery because so few grant programs cover such expenses; and (2) "innovation" has been removed as basis for eligibility, but is identified as a program principle (e.g., a needed program may not be innovative, each year).

Applications will not be received electronically because four copies, including attachments, are required for staff and Council review.

Documentation forms
Staff recommend that the proposed program application forms may be improved, as necessary, without requiring Council's approval.

6. Next Steps

Staff propose that the RCSAC and the Richmond Communities Committee be asked to review the application form for the clarity of terms, readability, eligibility requirements and other aspects of the application process that may present barriers to accessing City Grants. This consultation is proposed to occur in June, with a report back to Council in late July, 2008. Staff anticipate recommending that the existing City Grant Policy (3705) be rescinded and that the revised Grant Program, with any necessary revisions, be adopted as policy in July 2008.

During the course of the 2009 grant cycle, staff will monitor the program for any difficulties experienced by applicants, as well as challenges in program implementation. Staff will convey the results of this review, including any proposed program revisions, to Council as required.

Financial Considerations

Base Program Funding
The existing base program funding of $500,000 was reviewed and found to be adequate, partly because in 2005 the Grants budget was increased from $316,500 to $500,000. Most of the "additional" $183,500 has been allocated to Richmond Addiction Services (RAS) for the past three years. (Note that RAS has requested that the City fund its programs out of non-grant casino or other funds). This request will be reviewed by staff and recommendations presented to

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Council as part of the 2009 budget preparation process). It is recommended that the base program funding be reviewed every five years starting in 2013.
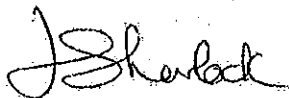
Cost of Living Increase

To assist with increasing costs, it is recommended that starting in 2009, an annual cost of living factor (i.e., CPI) be added to the base program funding. The proposed source of funding at the time of writing is the tax base because of the uncertainty in predicting any growth from Casino revenues. This base program amount will be increased by the CPI factor during the budget process by the Finance Division. The increase will be based upon the Vancouver CPI annual average change, which in 2008 was 2%. If this same rate were to be used for 2009, it would add $10,000 to the Grant Program and it would result in an approximate .007% tax increase.

For 2009, the following is proposed:

Grant Program Funding	
Base Funding 2009	$500,000 (reviewed every five years, beginning in 2013)
Consumer Price Index (CPI)	To be determined annually by Finance
TOTAL 2009	$500,000 + CPI = New base program funding

Conclusion

Staff recommend that the proposed 2008 Richmond Grant Program Application Form be circulated to the Richmond Community Services Advisory Committee and the Richmond Communities Committee for comments, prior to consideration of final Program approval in July 2008.

Lesley Sherlock
Social Planner
(604-276-4220)

LS:cas

ATTACHMENT 1: Existing Policy
ATTACHMENT 2: Existing Forms
ATTACHMENT 3: Proposed 2008 City Grant Program

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City of Richmond

Page 1 of 3	Adopted by Council: June 12, 2000	POLICY 3705
File Ref: 1085-00	GRANTS PROGRAM	

POLICY 3705:

It is Council policy that:

The principles on which grant funding will be approved are as follows:

A. GENERAL PRINCIPLES:

The City of Richmond supports the enhancement of a positive quality of life for all its residents, and the Council recognizes that one method of helping to achieve this goal is through an annual grants program.

Applications from non-profit or registered charitable organizations and/or groups are eligible for a City grant on the basis that they:

- offer projects, programs, services or events which have a demonstrated need in the community;

- provide the greatest benefits to the largest number of Richmond residents;

- exercise co-ordination and co-operation with other groups to prevent duplication of projects, programs, services or events;

- provide evidence of having sought funding from a variety of sources;

- promote volunteer participation and citizen involvement;

- apply a "user pay" philosophy, where applicable;

- use innovative approaches and techniques in addressing community issues;

- provide documentation supporting the financial need for funding, including, but not limited, to the current financial statements of the applicant;

- show real and financial need, and demonstrate the impact that would occur following non-funding from the City;

and on the understanding, that:

- Not all organizations meeting these general principles will automatically receive a grant or grant increase.

- Approval of a grant by the City in any particular year should not be viewed as an automatic ongoing source of annual funding. Grant renewals are not automatic.

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City of Richmond

Page 2 of 3	Adopted by Council: June 12, 2000	**POLICY 3705**
File Ref: 1085-00	**GRANTS PROGRAM**	

nor is any increase in funds. Grant approvals in a particular year, do not guarantee that grant requests in subsequent years will be successful.

- Only one application per year will be accepted per organization.

B. DEFINITIONS OF ELIGIBLE GRANT CATEGORIES:

1. **Category 1 and Category 2 Applicants – Applicable category for any application to be determined by Council.**

   Applicants may apply for Category 1 or Category 2 designation as follows:

   Category 1 applicants must be deemed to be providing unique and essential services to the community of Richmond. Applicants must demonstrate how their services fit under this designation. Applicants who are deemed to be Category 1 may apply for funding in subsequent years; and

   Category 2 applicants who receive funding would not be eligible to apply or receive funding for two subsequent years.

2. **Operating Assistance**

   Regular operating expenses or core budgets of established organizations, including supplies and equipment, heat, light, telephone, photocopying, rent, and administrative support salaries.

3. **Projects**

   One-time-only projects which respond to health, social and cultural needs within Richmond, must have a specific set of goals and objectives, and have a defined start and finish date.

4. **Programs and Services**

   Ongoing programs and services which contribute to the health and social well-being of Richmond residents, or which contribute to the general interest and advantage of the City.

5. **Events (Community Promotion)**

   Events which enhance and contribute to the cultural life of Richmond, which promote community involvement and spirit, and which have a defined start and finishing date (but may also be held annually), and which promote Richmond outside the City.

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City of Richmond

Page 3 of 3	Adopted by Council: June 12, 2000	POLICY 3705
File Ref: 1085-00	GRANTS PROGRAM	

6. **Council Discretion**

Council may, at its discretion, award grants to groups which offer a service deemed by Council to be of value to the City, or to community committees whose mandate is to function for the good of the City and its residents.

C. EXCLUSIONS FROM ELIGIBILITY FOR CITY GRANT:

- Applications from individuals

- Activities which are restricted to people of specific religious or ethnic groups

- Annual fund-raising campaigns, form letter requests or telephone campaigns

- Building funds or capital construction campaigns

- Debt retirement

- Expenses related to attendance at seminars, workshops, symposiums, or conferences

- Agencies which primarily fund other organizations

D. GRANTS REVIEW CONSIDERATIONS

Not all organizations meeting the criteria will automatically receive a grant. Grant allocations are dependent on the Grants budget established by City Council.

In reviewing grant applications and preparing recommendations for grant allocations, Council may give primary consideration to the following factors:

- Basic eligibility and demonstrates organizational efficiency, effectiveness and stability.

- numbers of Richmond residents served
- quality of service
- financial need of the organization
- community interaction
- role and number of volunteers
- use of existing community services and facilities
- local input into governance

160199

3

City of Richmond
6911 No. 3 Road
Richmond, BC V6Y 2C1
604-276-4000
www.richmond.ca

2008 Grant Application Package

City Grant Application forms are available from the **Information Counter at Richmond City Hall.**
Please read these instructions before completing the application form.

Instructions

1. Complete the form and send the *original plus three copies* to the **Information Counter** at Richmond City Hall by the stated deadline. **Note: Late submissions will not be considered.**

2. Please ensure your application includes the following documents:

   ☐ A list of the organization's Board of Directors, Officers and Executive Directors.

   ☐ The organization's audited financial statements for the most recent completed fiscal year.

   If audited financial statements are not available, submit the financial statements for the most recent completed fiscal year endorsed by two signing officers of the Board of Directors.

   ☐ The organization's 2008 fiscal year operating budget.

3. Submissions that do not contain complete financial and budgetary information will be considered incomplete and will not be accepted. Submissions should be on **letter-size paper**, and **single-sided.**

4. Please keep promotional support documents to a minimum.

5. If you have general questions regarding your application, please contact Lesley Sherlock, Social Planner, at 604-276-4220.

6. Return completed City Grant Application Form and enclosures by **Friday, October 12th, 2007** to:

   Information Counter
   (City Grant Applications)
   Richmond City Hall
   6911 No. 3 Road, Richmond, BC V6Y 2C1

7. Upon receipt of your application, a member of the City Staff Grants Review Committee may contact you to go over its details.

8. Decisions regarding funding allocations within the City Grants Budget rest with Richmond City Council.

9. Following Council approval of the Grants Budget, each applicant will receive notification of Council's decision pertaining to the application. The budgetary approval process may take three to five months.

Richmond Grants Policy

General Principles

The City of Richmond supports the enhancement of a positive quality of life for all its residents, and Richmond City Council recognizes that one means of helping to achieve this goal is through an annual grants program.

Applications from non-profit or registered charitable organizations and/or groups are eligible for a City grant on the basis that they:

- Offer projects, programs, services or events that have a demonstrated need in the community;

- Provide the greatest benefits to the highest number of Richmond residents;

- Exercise co-ordination and co-operation with other groups to prevent duplication of projects, programs, services or events;

- Provide evidence of having sought funding from a variety of sources;

- Promote volunteer participation and citizen involvement;

- Apply a "user pay" philosophy, where applicable;

- Use innovative approaches and techniques in addressing community issues;

- Provide documentation supporting the financial need for funding, including, but not limited to, the current financial statements of the applicant;

- Show real and financial need and demonstrate the impact that would occur following non-funding from the City;

and on the understanding that:

- Not all organizations meeting these general principles will automatically receive a grant or grant increase;

- Grant renewals are not automatic, nor is any increase in funds;

- Grant approvals in a particular year, do not guarantee that grant requests in subsequent years will be successful;

- Only one application per year will be accepted per organization.

Exclusions from Eligibility for City Grant

- Applications from individuals;

- Activities which are restricted to people of specific religious or ethnic groups;

- Annual fund-raising campaigns, form letters requests or telephone campaigns;

- Building funds or capital construction campaigns;

- Debt retirement;

- Expenses related to attendance at seminars, workshops, symposiums, or conferences;

- Agencies which primarily fund other organizations.

Grant Review Considerations

Not all organizations meeting the criteria will automatically receive a grant. Grant allocations are dependent on the Grants budget established by City Council.

In reviewing grant applications and preparing recommendations for grant allocations, Council may give primary consideration to the following factors:

- Basic eligibility and demonstrated organizational efficiency, effectiveness and stability;

- Number of Richmond residents served;

- Quality of service;

- Financial need of the organization;

- Community interaction;

- Role and number of volunteers;

- Use of existing community services and facilities;

- Local input into governance.

Definitions of Eligible Grant Categories

1. Operating Assistance

Regular operating expenses or core budgets of established organizations, including supplies and equipment; heat; light; telephone; photocopying; rent; and administrative support salaries.

2. Projects

One-time-only projects, which respond to health, social and cultural needs within Richmond, have a specific set of goals and objectives, and which have a defined start and finish date.

3. Programs and Services

Ongoing programs and services which contribute to the health, social and cultural well-being of Richmond residents, or which contribute to the general interest and advantage of the City.

4. Events (Community Promotion)

Events which enhance and contribute to the cultural life of Richmond, which promote community involvement and spirit, and which have a defined start and finish date (but may also be held annually), and which promote Richmond outside the City.

Council Discretion

Council may, at its discretion, award grants to groups which offer a service deemed by Council to be of value to the City, or to community committees whose mandate is to function for the good of the City and its residents.

City of Richmond
6911 No. 3 Road
Richmond, BC V6Y 2C1
604-276-4000
www.richmond.ca

2008 Grant Application Form

Complete the form and return the original plus three copies by **Friday, October 12th, 2007** to the **Information Counter**, Richmond City Hall, 6911 No. 3 Road, Richmond, BC V6Y 2C1.

1.   Identification of Applicant

Organization Name:	
Have you ever applied for a City grant under any other name in the last 5 years?	
Mailing Address: (Street, City, Postal Code)	Phone:
	Fax:
	Contact Person:
	Contact Phone:

2.   If this is a first-time request, attach a history and objectives of the organization.

3.   Board of Directors – Attach a sheet listing names, positions and addresses of all the Board Members and Officers.

4. Grant Information

A.   Amount of City grant request: $_____.

B.   Grant request is for: (check applicable)

☐ Operating Assistance
☐ Project
☐ Programs and Services
☐ Events

C.   Describe how the grant would be used:

D.   Describe how the City grant funding benefits Richmond residents:

E.   How many people are served by your organization? _____.

F.   How many Richmond residents are served by your organization? _____.

G.   Describe the unique nature, and value, of your City grant request in comparison to
     projects/programs of a similar nature in the community:

4. Grant Information (Cont'd.)

H.   Name any Richmond organizations that you collaborate with to ensure the success of your project/program:

I.   Describe how you work with the above organization(s):

J.   How will your organization measure and evaluate the community benefit of your project/program? Describe in detail:

5. Financial Overview of the Organization

A. Please attach the following information for the organization:

- The audited financial statements for the most recently completed fiscal year, including an Income Statement and Balance Sheet; and

- The 2008 fiscal year's budget including projected statement of expenses and revenues.

B. If your financial statement shows a surplus, please justify or explain the reason for this surplus:

C. If the organization received a City grant from Richmond last year, please **detail specifically** how the grant monies were spent. Please indicate if there was a surplus from the City grant money.

D. If given a City grant this year, please detail specifically how you will spend the funds:

E. Please describe the impact to your organization if a City grant is not received:

5. Financial Overview of the Organization (Cont'd.)

F.   Itemize any services that the organization receives from the City of Richmond (e.g. use of City facility, subsidized rents, property tax relief, photocopying, staffing etc.):

G.   If the organization received grants from other sources last year, please list the sources and amounts received, together with the specific details of what was accomplished with each of the grants.

H.   Is your organization applying for funding from other sources this year? List sources and amounts requested.

6. Staffing

	Number	Avg. Hrs/Week
Full-time employees:		
Part-time employees:		
Volunteers (excluding board members):		

PLEASE DO NOT ATTACH BULKY PACKAGES

Proposed
2008 Richmond Grant Program
City Of Richmond

Coordinated by The Policy Planning Division
City Of Richmond

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THE 2008 RICHMOND GRANT PROGRAM

1. Purpose

The purpose of the 2008 Richmond Grant Program is improve the previous Grant Program, to better:
- Achieve the City's Corporate Vision: "To be the most appealing, livable well managed City in Canada",
- Ensure that the limited Program dollars are effectively spent,
- Improve Program benefits, effectiveness, management, administration and phases.

2. Program Context
- The City of Richmond is one of the most diverse and family oriented communities in Canada.
- Richmond residents voluntarily form many types of community groups to meet a wide range of social, economic and environmental interests.
- In doing so, these groups assist in creating a vibrant, livable and appealing City.
- The Richmond City Council acknowledges that these groups:
  - Are essential in building a viable community,
  - Make Richmond a better place to live, work and play,
  - Address important needs and issues,
  - Wish to contribute their ideas, vast experience, abilities, and education,
  - Sometimes require financial assistance to implement their projects.

3. Principles

The Program is based on the following principles:
- Support The City's Corporate Vision
- Support Non Profit Groups
- Benefit Richmond Residents
- Maximize Program Benefits
- Promote Volunteerism
- Build Partnerships
- Increase Community Group Capacity
- Cost Sharing
- Cost Effectiveness
- Grants Earned - Not An Entitlement
- Promote User Pay of Community Group Programs
- Innovation.

4. Goal Of The City Grant Program

The goal of the program is to build strong communities by assisting non-profit community groups in delivering services to Richmond residents.

5. Program Objectives

The objectives of the Grant Program are:
- To improve the quality of life of Richmond residents through a wide range of beneficial community group programs,
- To assist primarily Richmond based community groups to provide more beneficial programs, to more residents,
- To build community group capacity to deliver programs,
- To promote partnerships and financial cost sharing among the City, other funders and community groups.

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6. The Program Multiple Criteria

To maximize The City's Program benefits and limited funds, the following Criteria are established. Applications that meet these criteria will be favoured.

- Criteria A: Benefits To The Richmond Community
- Criteria B: Benefits To Applicant Groups [Program Clients]

MULTIPLE CRITERIA - CITY GRANT PROGRAM			
CRITERIA A - BENEFITS TO THE RICHMOND COMMUNITY			
General Objectives	**Group Assist Priorities**	**Types Of Residents Served**	**Priority Activities**
– Promote Livability	– Stable capable groups	– Primarily Richmond residents	– Prevention
– Promote Appealing	– Groups who form partnerships	– Seniors	– Intervention – Treatment
– Build A Legacy		– People with disabilities	– Wellness
– Build Sustainability		– Children	– Maximize the quality of funded services
– Build Financial Viability		– Youth	– Maximize the number of those helped.
– Build A Complete Community		– Families	– Build organizational capacity
– Promote "Well Managed"		– Low Income	– Build community capacity
– Promote Diversity		– Women	– Improve the quality of life:
– Promote Volunteerism		– Immigrants	• Social
– Promote Wellness		– Tourists	• Economic
– Innovation		– Other	• Environmental
– Other			– Sustainability
			– Other
CRITERIA B - BENEFITS TO APPLICANT GROUP			
General Priorities		**Less Favourably Considered**	
– Maximize quality of service		– Only City funding for project	
– Maximize number served		– Single Group & City funded projects	
– Promote financial partnerships		– Group becoming dependant on City grants	
– Leverage more funds from others		– Insufficient Partnering	
– Build organizational capacity		– Duplication of Service	
– Build community capacity		– Groups with unaccounted for surplus or deficit	
– Other		– Other	

7. Interpreting The Program's Multiple Criteria
- The following tables clarify how the Multiple Criteria can be met.
- Applications are to indicate how.

CRITERIA A - BENEFITS TO THE RICHMOND COMMUNITY	
General Objectives	**Interpretation**
– Promote Livability	
– Promote Appealing	
– Build A Legacy	➤ Applications are to clearly address some of these criteria.
– Build Sustainability	
– Build Financial Viability	➤ Applications which promote volunteer participation and citizen involvement are encouraged
– Build A Complete Community	
– Promote "Well Managed"	
– Promote Diversity	➤ Innovation is encouraged
– Promote Volunteerism	
– Promote Wellness	
– Innovation	
– Other	
Group Assist Priorities	
– Stable capable groups	➤ Applications are to clearly address criteria.
– Groups who form partnerships	➤ Funding from other sources is expected.
– Other	
Types Of Residents	
– Serves primarily Richmond residents	➤ Applications must address at least one of these communities:
– Seniors	➤ Group program objectives must be stated.
– People with Disabilities	➤ Need: Applications are to:
– Children	• Demonstrate community need
– Youth	• Show financial need, and
– Families	• Demonstrate the impact that would occur if the City did not fund the application.
– Low Income	
– Women	➤ Maximize Benefits:
– Immigrants	Applications that provide the greatest benefits to the largest number of Richmond residents are encouraged.
– Tourists	
– Other	
Priority Activities	
– Prevention	
– Intervention	
– Treatment	
– Wellness	
– Maximize those helped	
– Build organizational capacity	
– Build community capacity	➤ Applications must address one of these types
– Improve the quality of life:	
• Social	➤ How the Group's program benefits people must be stated.
• Economic	
• Environmental	
– Sustainability	
– Other	

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CRITERIA B - BENEFITS TO APPLICANT GROUP	
General Priorities	**Interpretation**
– Maximize quality of service	
– Maximize number served	➢ The Group's program benefits must be clearly stated. ➢ What the Group will do must be clearly stated. ➢ The City will favour applications that involve more partners.
– Promote financial partnerships	➢ How Group and/or resident capacity is built must be explained. ➢ Co-ordination: ▪ Applications, which demonstrate co-ordination and co-operation with other groups to prevent the duplication of projects, programs, services or events, are favoured.
– Leverage more funds from others	➢ Multiple-Funded Project: ▪ Applications, which provide evidence of having funding from a variety of sources, are favoured.
– Build organizational capacity	➢ "User Pay" Where appropriate, projects that require that the users of the proposed program/ service pay some amount for the services are favoured.
– Build community capacity	
– Other	
Less Favourably Considered	
– Only City funding for project	
– Single Group & City funded projects	
– Group becoming dependant on City grants	➢ These programs will not be favoured.
– Insufficient partnering	
– Duplication of service	
– Groups with unaccounted surplus or deficit	
– Other	

8. Policies

(1.) Program Phases and Considerations

The following Program phases and considerations are to be managed, monitored and improved, as necessary:

Program Phase	Who	Activity	Considerations
Phase 1	City staff	Prepare For Annual Grants	• Follow Program requirements • Promoting the Program

Phase 2	Applicant	Apply For A Grant	• Stability - of Group applying
			• Capability – experience, reliability of Group
			• Accountability - of Group
			• Maximum benefits:
			  • Increased numbers served
			  • Of quality of service
			• Degree of Need
			• Most assisted per grant
			• Cost effectiveness - of proposal
			• Promote multiple partner funding & support
			• Leverage of more funds from others
			• Group's own support of their application:
			  • Funding
			  • Services,
			  • In-kind resources
			• Thoroughness of proposal
			• Clarity of proposal
			• Amount of requested grant
			• Benefits of any previous City grant

Phase 3	City staff	• Review applications • Make recommendations	Follow program requirements

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Program Phase	Who	Activity	Considerations
Phase 4	Council	• Reviews applications • Reviews staff recommendations • Considers any presentations • Awards Grants • Any referrals by Council regarding the grant recommendations will be addressed by staff and forwarded to Council	• Program Principles • Program Policies
Phase 5	City staff	Issues letters: • Awarded grants • Explaining denied grants	Follow program requirements
Phase 6	Applicant	Delivers funded service/program	Follow program requirements
Phase 7	Applicant	Monitors funded service/program	Follow program requirements
Phase 8	Applicant	Reports results to City: • Mid year, or • At end of service/program, or • When next applying for a grant	Follow program requirements
Phase 9	City staff	Periodically: • Evaluates Grant benefits • Evaluates Grant Program • Proposes Program improvements	• Address Council instructions • Analysis • Options • Make recommendations
Phase 10	Council	• Reviews recommendations • Approves changes	Makes decisions
Phase 11	City staff	Implements program changes	Follow program requirements

(2.) Program Funding

a) Base Program Funding
- Until Council determines otherwise, $500,000 is available for the Program.
- Every three years beginning in 2013, Council will review base program funding.
- Council may increase or decrease the amount allocated to the Program, or keep it the same, based on overall City corporate priorities.

b) Annual Cost of Living Increase
- To maintain the effectiveness of Program base funding in light of general rising costs (e.g., the cost of living, fees), starting in 2009 and each year thereafter, an annual cost of living factor will be automatically added to the base program funding.
- The cost of living increase will be based on the Vancouver CPI annual average change as determined by BC Stats for the previous year.
- Finance Division of the City of Richmond will determine the amount annually and add it to the base program funding.

2009 Grant Program Funding	
Base Funding	$500,000 (reviewed every 5 yrs., beginning in 2013)
Consumer Price Index (CPI)	To be determined annually
TOTAL	$500,000 + CPI = New base program funding

c) Unused Program Funds
At the end of each year, any unallocated Grant Program dollars must be returned to the City's General Revenue Account.

(3.) Who Can Apply:
- Only registered non-profit groups.
- The Group's Board must approve of the application being submitted.

(4.) Who Cannot Apply
- Groups other than registered non-profit groups [e.g., for profit groups].
- Individuals, who do not represent a registered non-profit group.

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- Public and private schools including post-secondary educational institutions, or groups seeking funding for school-based programs
- Pre-schools and child care providers [A separate City Child Care Grant Program exists].
- Agencies that provide grants.
- Others, as determined by Council.

(5.) Applications Per Year

Due to limited Program funds, only one application per Group/ per year will be accepted.

(6.) Application Deadline

The annual deadline for submitting City grant applications will be determined annually (e.g., on the second Friday of October).

(7.) Late Applications

Applications which miss the application deadline must not be accepted, processed or funded from the Grant Program for that application year, as:

- There is an ample annual application notice period for all.
- There are limited Program funds.
- The Program management phases are to be competed within a defined time period.
- Applicants desire a decision, as soon as possible.
- The processing of late applications would require that those applications that made the deadline be re-evaluated, thus delaying the process.
- Late applications may apply in the next year.

(8.) Benefits of Funding Proposal

To determine the benefits of funded group programs, the following qualitative and quantitative factors are considered:

- The quality and credibility of the group (e.g., accreditation, licenses).
- The purpose of the proposed program (e.g., prevention, treatment and wellness programs have inherent value).
- The quality of the program offered (e.g., sound practice followed, delivered by responsible people and professionals).
- The number of clients served.
- Evaluations of the program once delivered (e.g., client and participant letters, surveys; community acceptance; program evaluations).
- Benefits to the community at large.

(9.) Quality Of Documentation

- A quality, fully completed application has a better chance of receiving City funding (see chart below).

Quality Of Application	Comments
− Thoroughness of proposal	
− Clarity of proposal	
− Amount of requested grant and why	➢ Applications are to clearly address criteria.
− State proposed benefits of City grant	➢ Groups must be accountable.
− Capability of Group to deliver project	➢ Groups must demonstrate that they are capable.
− Applicants are to demonstrate financial partnerships and whether they have been: • Applied for, or • Already received	➢ Applications are to clearly and fully state funding details

- City staff have a limited amount of time to ask groups to clarify their applications.
- Applicants are required to address Grant Program Phases 2, 6, 7 and 8.
- Successful applicants are those who fully address all their Program Phases and requirements.
- Applicants are to provide documentation that addresses the Program Principles, Goals, Objectives, Multiple Criteria, Policies and requirements.

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- How well applicants do this thoroughly and with clarity, will affect the success of their application and their future applications.
- All application projects must have a specific set of goals, objectives, deliverables, clients and benefits.
- All funded activities must specify a start and finishing date.
- Documented authorization of the application by the Group's Board must be provided (e.g., Board resolution).
- All required documentation is indicated on the Grant Notice and Application.

(10.) Financial Considerations

- Applicants must submit:
  a) The Group's audited financial statements for the most recent completed fiscal year including the auditors report signed by the external auditors.
  b) If audited financial statements are not available, submit the reviewed financial statements for the most recent completed fiscal year along with the review engagement report signed by the external auditors.
  c) If neither audited nor reviewed financial statements are available, submit the compiled financial statements for the most recent completed fiscal year along with a compilation report signed by the external auditors
  d) If neither a, b, or c are available, financial statements for the most recent completed fiscal year endorsed by two signing officers of the Board of Directors
  e) The Group's current fiscal year operating budget.
  f) The Group's budget to support the application (e.g., Event, Project, Program or Operating Assistance budget).
- Group applications will be reviewed for financial accountability by Finance staff.

(11.) User Pay Principle

Applicants are encouraged to consider applying the "user pay" principle, where appropriate [e.g., users of the proposed service, program, or project would pay some of the cost].

(12.) Less Favourably Considered Applications

Applications which are less favoured, are those which:
- Rely only on City funding
- Are funded by a single Group and the City
- Risk the Group becoming dependant on City grants
- Demonstrate insufficient partnering
- Duplicate existing services
- Other

(13.) Staff Review Of Applications

- Staff are to administer the Program based on the Program Principles, Goals, Principles, Objectives, Multiple Criteria, Policies and Requirements.
- As staff review applications, they may contact the applicants and others, to clarify the proposals.
- As it is Council who makes the final grant decisions, while reviewing applications, staff are not to advise applicants regarding:
  - Whether or not they will receive a grant, or
  - The possible amount of a grant.

(14.) Funding Streams

- To facilitate comparisons, staff will categorize the applications as follows:
  - Services (e.g., Health, Social and Safety), and
  - Events (e.g., Cultural and Community).

- Staff will provide information to Council regarding the total amount requested and recommended in each category as part of the annual grants review report.

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(15.) Purposes Eligible for Funding
Grants may be used for the following purposes:

1. **Operating Assistance**
    Regular operating expenses or core budgets of established organizations, including supplies and equipment, heat, light, telephone, photocopying, rent, and administrative support salaries.

2. **Community Service (e.g., program, project)**
    Must respond to the program criteria, have specific goals and objectives, and have a defined start and finish date.

3. **Community Event**
    Must respond to the program criteria, have specific goals and objectives, and have a defined start and finish date.

(16.) Items Eligible For Funding
The eligible items which may be funded are those required to directly deliver the project, including, including regular Group operating expenses or program/project specific expenses, including:
- Professional and administrative salaries and benefits
- Consultant services to deliver the project
- Office rent
- Supplies
- Equipment
- Rentals [e.g., vehicles, equipment, and maintenance]
- Heat
- Light
- Telephone
- Photocopying
- Materials

(17.) Items Not Eligible For Funding
Grants are not for:
- Debt retirement
- Land and land improvements
- Building construction and repairs
- Retroactive funding
- Operating deficits
- Proposals which primarily fund or award other groups
- Political activities including:
    - Promoting or serving a political party or Group,
    - Lobbying of a political party, or for a political cause,
- Activities that are restricted to or primarily serve the membership of the organization, unless group membership is open to a wide sector of the community (e.g., women, seniors) and is available free-of-charge or for a nominal fee that may be reduced or exempted in case of need.
- Expenses that may be funded by other government programs or entities
- Annual fund-raising campaigns, form letter requests or telephone campaigns
- Expenses related to attendance at seminars, workshops, symposiums, or conferences
- Public and private school based programs
- Other, as Council may determine.

(18.) Grant Allocation Considerations
- In reviewing grant applications, preparing recommendations and making grant decisions, primary consideration is given to meeting the Program Principles, Goals, Objectives, Multiple Criteria, Policies and Requirements including:
    - Demonstrated organizational efficiency, effectiveness and stability
    - The number of Richmond residents served
    - The quality of service

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- The financial need of the Group
- The proposed community interaction
- The role and number of volunteers
- The use of existing community services and facilities
- Unique nature – not a duplication of service
- Applying to more than one funding source
- Other City programs, services and financial assistance already provided
- Grant allocations are partially dependent on the annual Program budget.
- The value of any other City support (e.g., space, photocopying, staff services) that the Group receives may affect the amount of grant awarded.
- Not all groups meeting the Program requirements will necessarily receive a grant.
- Based on the number of applications, groups may not receive the full grant that they request, but only a portion of it.
- Grants are not to be regarded as an entitlement.
- Approval of a grant in any one year is not to be regarded as an automatic ongoing source of annual funding.
- As Council wishes to maximize benefits from the Grant Program, the assessment of City Grant applications is flexible.

(19.) Timing Of Grant Decisions
Generally, Council will decide on the applications in the first quarter of the year; however, no specific date is set to allow for processing, budget and timing.

(20.) No Interim Funding
There is to be no interim funding of a group or its application while it waits to hear if its application is approved, as such would delay application review times and final decisions.

(21.) Council Decision
- Council will make the final grant decisions, at its sole discretion, based on the Program Goals, Principles, Multiple Criteria, Policies and Requirements, and a review of City staff recommendations.

- Council may:
    - Approve a funding application:
        - In total, with or without conditions (e.g., subject to a mid-year review)
        - In part, with or without conditions
    - Ask for more information
    - Issue dollars in phases with conditions
    - Deny an application.

- For example, where a large amount of grant money is to be provided, or where Council is not familiar with the proposed program, Council may:
    - Issue the program dollars in phases, and
    - Request additional information (e.g., mid-year reviews) to ascertain program benefits prior to issuing any additional program dollars.

- If an application is not funded by Council, it is deemed to be denied.

(22.) Recuperation of Grant
Should the funds not be used for the stated purpose, the applicant is to automatically return them to the City.

(23.) No Appeal
There is no appeal to Council's decision, due to the high number of applications for limited Grant Program funding, and as applicants may apply in the next year.

(24.) Reporting of Grant Benefits
Those who receive a City grant are required to demonstrate the benefits of their program, by providing:

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- A statement of program purpose
- Program evaluations (e.g., by group, or independent sources)

Groups are required to demonstrate program benefits in several ways:
- When they apply, by providing information regarding anticipated program benefits,
- After they receive a grant, at the year end and before applying again, by providing information regarding the program benefits including evaluation results

On a random basis, mid-year progress and financial reports will be requested.

(25.) Program Review
- The Program will be reviewed annually by staff after the grants have been awarded for that year.
- Council may change the Program at any time.

(26.) Program Support Documents - see Attached
To facilitate Program administration, a variety of documents may be used and modified from time to time by staff, including:

ATTACHMENT A	GRANT PROGRAM APPLICATION NOTICE
ATTACHMENT B	GRANT PROGRAM APPLICATION FORM
ATTACHMENT C	AN INTERNAL STAFF CHECKLIST TO SUMMARIZE ANNUAL GRANT APPLICATIONS
ATTACHMENT D	GRANT APPLICATION SUMMARY SHEET (FOR COUNCIL)

GRANT PROGRAM APPLICATION NOTICE

City of Richmond	**Grant Program Application Notice**
6911 No. 3 Road Richmond, BC V6Y 2C1 (604) 276-4000 www.richmond.ca	

Grant Application Forms are available from the **Information Counter at Richmond City Hall, or on the City's Website at www.richmond.ca.**

Please read the 2008 Richmond Grant Program, and these instructions, before completing the application form.

▢ SUBMISSION REQUIREMENTS

1. Please complete the form thoroughly.

2. Please ensure that your application includes the following documents:

   ☐ A list of the Group's Board of Directors, Officers and Executive Directors including addresses and contact information.

   ☐ The Group's audited financial statements for the most recent completed fiscal year including the auditors' report signed by the external auditors, or one of the following alternatives:
   - If audited financial statements are not available, submit the reviewed financial statements for the most recent completed fiscal year along with the review engagement report signed by the external auditors.
   - If neither audited nor reviewed financial statements are available, submit the compiled financial statements for the most recent completed fiscal year along with a compilation report signed by the external auditors
   - If neither a, b, or c are available, financial statements for the most recent completed fiscal year endorsed by two signing officers of the Board of Directors

   ☐ The Group's current fiscal year operating budget.

   ☐ The Group's proposed grant use budget (e.g. Event, Project, Program or Operating Assistance budget).

   ☐ A resolution by the Group's Board of the application being submitted.

   ☐ If a City grant was received in the previous year, include the results to show community benefit (See #10 Measuring Community Benefits).

3. Submissions should be on letter-size paper, single-sided and three whole-punched.

4. Documentation that supports your request may also be included.

5. Send **four complete copies** of your application package, including four copies of the cover letter and supporting documents, to the **Information Counter** at Richmond City Hall by the stated deadline.

6. Submissions that do not contain complete financial and budgetary information will be considered incomplete and will not be accepted.

7. **Note: Late submissions will not be considered.**

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Application Deadline: _____

❑ APPLICATION PROCESS

1. If you have general questions regarding your application, please contact Lesley Sherlock, Social Planner, Policy Planning Division, City of Richmond at (604) 276-4220.

2. As part of the review process, a member of the City Staff Grants Review Committee may contact you for further information.

3. Decisions regarding funding allocations within the City Grants Budget rest with Richmond City Council.

4. Following Council approval of the Grants Budget, each applicant will receive notification of Council's decision pertaining to the application.

5. The annual review and allocation of City grants may take three to six months.

6. **Please submit your application by (date, time)_____ to:**

The Information Counter
(City Grant Applications)
Richmond City Hall
6911 No. 3 Road
Richmond, BC V6Y 2C1

City of Richmond Vision

The Vision statement for the City of Richmond is meant to provide a clear image of where the City is heading over the next decade or two.

Non-profit groups are integral to the City achieving this vision.

This application asks that your group identify how your grant proposal contributes to the achievement of this vision.

> **Our Vision is....**
>
> *"For the City of Richmond to be the most appealing, livable, and well-managed community in Canada".*

APPLICANTS ARE REQUESTED TO PLEASE:

1. **COMPLETE THE FOLLOWING APPLICATION FORM**

AND

2. **ATTACH SUPPORTING INFORMATION, AS NECESSARY.**

3. **APPLICATION DEADLINE _____**
4.

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Application Deadline: _____

GRANT APPLICATION FORM

1. IDENTIFICATION OF APPLICANT GROUP

Please attach written approval by the Group's Board to submit this application.
Group Name:
BC Society Registration Number:
Revenue Canada Charitable Group Number: [if applicable]
Contact Person:

Mailing Address	
PO Box	
Street	
City	
Postal Code	
Contact Phone:	Contact Fax:
Contact Email:	
Web Site Address	

This Grant Application is for:	
Amount of City Grant Requested $_____	☐ Group Operating Assistance, and/or ☐ A Community Service (e.g., Event, Program, Project) ☐ An Ongoing Activity, and/or ☐ A One time Activity Start date: End date:
Please describe specifically how the City's grant will be used:	

Application Deadline: _____

Previous Year's Grants	
Amount Received $\$$_____ **Year** _____	**Did you receive a grant last year?** ☐ No ☐ Yes If Yes: Group Name: _____
Amount Received $\$$_____ **Year** _____	**Did you apply and receive a City Grant under any other name in the last 5 years?** ☐ No ☐ Yes If Yes: Group Name: _____

2. DESCRIBE YOUR GROUP

(1) Please attach:
- Your history
- Your Group's Purpose, Vision, Goals, Objectives (include organizational chart if available)
- Board of Directors' names, positions and addresses, identifying officers
- Executive Director contact information.

(2) This grant request will be used for the following staff and/or volunteers:

Staff	Number	Avg. Hrs/Week
Full-time employees		
Part-time employees		
Volunteers (excluding board members)		

(3) How many people does your Group serve? _____

(4) How many Richmond residents does your Group serve? _____

3. YOUR GROUP'S FINANCIAL INFORMATION:

(1) Please attach the following information for your Group:

☐ **Group's Past Audited Financial Statements**
  - Include an Income Statement and Balance Sheet;

☐ **Group's Proposed Current Year Operating Budget**
  - Include projected statements of expenses and revenues; and,

☐ **Group's Proposed Event / Project / Program Application Budget**
  - Include projected revenues and expenses.

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Application Deadline: _____

(2) Please complete the following **Group Total Annual Budget Summary Table.**

GROUP TOTAL ANNUAL BUDGET SUMMARY TABLE		
For All Activities Of The Group	**Most Recent Completed Year** (e.g., Audited Financial Statement)	**Current Year**
Total Group Revenue	Year: _____ Amount $	Year: _____ Amount $
Total Group Expenses	Year: _____ Amount $	Year _____ Amount $
Any Total Accumulated Group Surplus?	Year: _____ No ☐ Yes ☐ Amount $	Year: _____ No ☐ Yes ☐ Amount $
Any Total Accumulated Group Deficit?	Year: _____ No ☐ Yes ☐ Amount $	Year: _____ No ☐ Yes ☐ Amount $
Please detail and explain any total accumulated Group surplus, or deficit.		
_____		
_____		
_____		
_____		
_____		
_____		
_____		
_____		
_____		
_____		
_____		

4. **MOST RECENT CITY GRANT [If applicable]**

   (1.) If your Group received a City grant from Richmond last year, please **detail** specifically how the grant monies were spent.

   _____
   _____
   _____

   (2.) Please indicate if there was a surplus from the City grant money.
   ☐ NO
   ☐ YES   If YES: How much? $_____   What year? _____

   (3.) If yes, why was there a surplus from the City grant money and how do you plan to spend it?

   _____
   _____
   _____

   (4.) Attach outcome measurement results (see #10). If the grant goals & objectives have changed since your previous application, or were not met, please indicate why.

   _____
   _____
   _____

2447338   **Application Deadline:** _____

5. PROPOSED GRANT BUDGET

- ❑ Please indicate what your group is applying for:

   - ❑ Group Operating Assistance

   - ❑ A Community Service (e.g., event, program, project)

- ❑ Please indicate what your group is applying for:

   - ❑ An Ongoing Activity

   - ❑ A One-Time Activity

PROPOSED GRANT BUDGET SUMMARY		
OVERVIEW	**Current Year**	
Total Operating, Community Service (e.g., Event, Project Program) Revenue	$	
Total Operating, Community Service (e.g., Event, Project Program) Expenses	$	
DETAILS Of ITEMS REQUESTED FOR CITY GRANT FUNDING	**Amount**	**% Of Budget**
Professional and administrative salaries and benefits (full time)		
Professional and administrative salaries and benefits (part time)		
Consultant services		
Office rent		
Supplies		
Equipment		
Rentals [e.g., vehicles, equipment, and maintenance]		
Heat		
Light		
Telephone		
Photocopying		
Materials		
Other (please specify)		
TOTAL		100%

6. **GRANT PROPOSAL FUNDING PROFILE**
   (1.) I f applicable, please complete the following table.

GRANT PROPOSAL FUNDING	AMOUNT	% OF TOTAL BUDGET	CONFIRMED YES?	CONFIRMED NO?
Total Operating Assistance, Community Service (e.g., Event, Program or Project) Cost	$			
Total Amount Provided By Your Group	$	%		
Total Amount To Be Provided From All Other Funders [Please complete 6 (2) below]	$	%		
Total Amount Of City Grant Requested	$	%		
TOTAL		100%		

(2.) F inancial Assistance From Other Sources
   If your Group is applying for funding from other sources (e.g., other grants, donations, financial assistance or sponsorships) regarding this grant proposal, please detail below.

Funder Name 1 _____

Amount _____

Details: How used? _____

_____

_____

Funder Name 2 _____

Amount _____

Details: How used? _____

_____

_____

Funder Name 3 _____

Amount _____

Details: How used? _____

_____

_____

7. **USER PAY PRINCIPLE**
   Will the people you intend to serve with the proposed program or service pay some fee to receive it?

   ☐ YES: If Yes How much? $_____, per person, Group
   ☐ NO: Why?

   _____

   _____

8. **OTHER CITY OF RICHMOND SUPPORT RECEIVED**
   Please Itemize any services that your Group receives from the City of Richmond (e.g. use of City facility, subsidized rents, property tax relief, photocopying, staffing etc.):

Type Of City Support	Estimated Value $	Please provide details
(Example: Free rental space)	$50 / evening	Rental fee waived for 10 weeks = $500
TOTAL		

Application Deadline: _____

9. **COMMUNITY NEED**
Have you determined that there is a need in the community for this particular operating expense, program, etc.? ☐ YES ☐ NO

If yes, describe the method used to establish need and the results. _____

_____

_____

_____

_____

_____

10. **PLEASE SPECIFY WHICH RICHMOND RESIDENTS YOUR GRANT APPLICATION WILL SERVE**
Using the table below, please identify whom your application will benefit.

Grant Clients	Name Target Group [if appropriate] / Specify	How Many Totally Served?	How many are Richmond residents?
Primarily Richmond residents			
Seniors			
People with Disabilities			
Children			
Youth			
Families			
Low Income			
Women			
Immigrants			
Tourists			
Other			

11. **IDENTIFY PROPOSED GRANT USE GOALS, OBJECTIVES, DELIVERABLES AND OUTCOME MEASUREMENTS**
Please complete the table and attach information, as necessary.

GOALS What you hope to achieve	OBJECTIVES How will you achieve the goals?	DELIVERABLES What specific activities will you undertake to achieve the objectives?	OUTCOME MEASUREMENT How will you measure results (e.g., statistics, surveys)?

Application Deadline: _____

12. IDENTIFY HOW YOUR GRANT PROPOSAL WOULD BENEFIT RICHMOND RESIDENTS

Please complete the checklist and attach information, as necessary:

Criteria A – Benefits To Community	CRITERIA MET?		COMMENTS
	YES	NO	
☐ General Objectives			
Promote Livability			
Promote An Appealing City			
Build A Legacy			
Build Sustainability			
Build Financial Viability			
Build A Complete Community			
Promote "Well Managed"			
Promote Diversity			
Promote Volunteerism			
Promote Wellness			
Innovation			
Other			
☐ Group Assist Priorities	YES	NO	
Stable capable groups			
Groups who form financial partnerships			
Other			
☐ Types Of Residents	YES	NO	
Primarily Richmond residents			
Seniors			
People with disabilities			
Children			
Youth			
Families			
Low Income			
Women			
Immigrants			
Tourists			
Other			
☐ Priority Activities	YES	NO	
Social			
Prevention			
Intervention			
Treatment			
Wellness			
More people helped			
Maximize those helped			
Build organizational capacity			
Build community capacity			
Improve the quality of life:			
• Safety			
• Arts			
• Culture			
• Heritage			
• Other			
Economic			
Environmental			
Sustainability			
Other			

Application Deadline: _____

Criteria B - Benefits To Applicant Group	CRITERIA MET?		HOW?
	YES	NO	
❑ General – Does Your Application?			
Maximize the quality of service			
Maximize the number of people served			
Promote financial partnerships			
Leverage more funds from others			
Build organizational capacity			
Build community capacity			
Other			

13. SUPPORT FROM PARTNERS

(1) Please identify any groups that you propose to partner with, to deliver and ensure the success of your proposed grant use:

Group (Partners will be contacted for verification)	Role/Activity [e.g., administrative, supervision, leadership] [There should be no duplication of roles]
Supporting Group 1	
Group Name:	
Contact Name:	
Position In Group:	
Telephone Number	Business: Cell:
Supporting Group's Roles and Activities	❑ ❑ ❑
Supporting Group 2	
Group Name:	
Contact Name:	
Position In Group:	

Application Deadline: _____

Group (Partners will be contacted for verification)		Role/Activity [e.g., administrative, supervision, leadership] [There should be no duplication of roles]
Telephone Number	Business:	Cell:
Supporting Group's Roles and Activities	☐ ☐ ☐	
Supporting Group 3		
Group Name:		
Contact Name:		
Position In Group:		
Telephone Number	Business:	Cell:
Supporting Group's Roles and Activities	☐ ☐ ☐	

(2) Please provide letters of support from your partners.

14. YOUR APPLICATION
Please submit **FOUR COPIES** of your application including cover letter and attachments.

15. VERIFYING YOUR APPLICATION
Please verify the information provided in this application by signing below and including documentation of your Board's resolution to approve the application.

Application completed by:
Name
Title
Signature
Board Approval
Board Chair Name
Date of Board Approval
Signature

HAVE YOU .

➢ COMPLETED THE FORM?
➢ ATTACHED SUPPORTING INFORMATION, AS NECESSARY?
➢ ATTACHED ALL REQUIRED DOCUMENTS (SEE SUBMISSION REQUIREMENTS, p. 1)

PLEASE DO NOT ATTACH BULKY PACKAGES

APPLICATION DEADLINE: OCTOBER xx, 2008

2447338   **Application Deadline:** _____

AN INTERNAL STAFF CHECKLIST

Part 1: SUMMARY CHECKLIST FOR EACH ANNUAL GRANT APPLICATION

1. Applicant: _____

2. Name Of Project: _____

3. Date Received: _____

4. Late Application? _____ Late By: _____Months_____Days

5. Focus?   ☐ A Service (e.g., Health, Social, Safety)   ☐ An Event (e.g., Cultural, Community)

6. Meet Criteria?

Criteria A - Benefits To Community	CRITERIA MET?		COMMENT
	YES	NO	
☐ General Objectives			
Promote Livability			
Promote Appealing			
Build A Legacy			
Build Sustainability			
Build Financial Viability			
Build A Complete Community			
Promote "Well Managed"			
Promote Diversity			
Promote Volunteerism			
Promote Wellness			
Innovation			
Other			
☐ Group Assist Priorities			
Stable capable groups			
Groups who form partnerships			
Other			
☐ Types Of Residents			
Serve primarily Richmond residents			
Seniors			
People with Disabilities			
Children			
Youth			
Families			
Low Income			
Women			
Immigrants			
Tourists			
Other			
☐ Priority Activities			
Social			
Prevention			
Treatment			
Wellness			
More people helped			
Maximize those helped			
Build organizational capacity			
Build community capacity			
Improve the quality of life			
Safety			
Arts			
Culture			
Heritage			
Other			
Economic			
Environmental			
Sustainability			
Other			

Criteria B - Benefits To Applicant Group	CRITERIA MET?		Comments
	YES	YES	
☐ General			
Maximize quality of service			
Maximize number served			
Promote partnerships			
Leverage more funds from others			
Build organizational capacity			
Build community capacity			
Other			
☐ Criteria C Grants Less Favourably Considered			
Only City funding for project			
Single Group & City funded projects			
Group becoming dependant on City grants			
Insufficient partnering			
Duplication of service			
Other			
☐ Criteria D APPLICATION VERIFICATION			
Authorized by Board			
Date of Authorization given			

Part 2: STAFF RECOMMENDATION

1. Comments On Application

2. Requested Amount:_____

3. Recommended Amount:_____

4. Decision

Yes because

Yes, with conditions

No because

5. All documentation submitted?   ☐ Yes   ☐ No

6. Reviewer

Name_____

Title_____

Email_____   Phone _____

Grant Application Summary Sheet

	City of Richmond	**200___ Grant Application Summary Sheet**	
1	Applicant	✪	
2	Grant Request	$✪	For:
3	Summary of Request		
4	Focus	❑ A Service (e.g., Health, Social & Safety) ❑ An Event (e.g., Cultural, Community)	

5	MULTIPLE CRITERIA - CITY GRANT PROGRAM

CRITERIA A - BENEFITS TO THE RICHMOND COMMUNITY

General Objectives	Group Assist Priorities	Types Of Residents	Priority Activities
❑ Promote Livability	❑ Stable capable groups	❑ Serve primarily Richmond residents	❑ Prevention
❑ Promote Appealing	❑ Groups who form partnerships	❑ Seniors	❑ Intervention
❑ Build A Legacy		❑ People with Disabilities	❑ Treatment
❑ Build Sustainability		❑ Children	❑ Wellness
❑ Build Financial Viability		❑ Youth	❑ Maximize the quality of funded services
❑ Build A Complete Community		❑ Families	❑ Maximize the number of those helped.
❑ Promote - "Well Managed"		❑ Low Income	❑ Build organizational capacity
❑ Promote Diversity		❑ Women	❑ Build community capacity
❑ Promote Volunteerism		❑ Immigrants	❑ Improve the quality of life:
❑ Promote Wellness		❑ Tourists	• Social
❑ Innovation		❑ Other	• Economic
❑ Other			• Environmental
			❑ Sustainability
			❑ Other

CRITERIA B - BENEFITS TO APPLICANT GROUP

General Priorities	Less Favourably Considered
❑ Maximize quality of service	❑ Only City funding for project
❑ Maximize number served	❑ Single Group & City funded projects
❑ Promote financial partnerships	❑ Group becoming dependant on City grants
❑ Leverage more funds from others	❑ Insufficient Partnering
❑ Build Capacity of Organizations	❑ Duplication of service
❑ Other	❑ Groups with unaccounted surplus or deficit
	❑ Other

2447338

Grant Application Summary Sheet continued

6	Number of Richmond residents served by Group	✪	
7	Services received from City	Value $ Please detail	
8	Amount of Previous Year Grant and Spending Details	$✪ Please detail	

9	YOUR GROUP'S TOTAL BUDGET	Most Recent Completed Year (e.g., Audited Financial Statement)	Budget for Current Year
	Total Revenue	$ ✪	$ ✪
	Total Expenses	$ ✪	$ ✪
	Surplus or (Deficit)	$ ✪	$ ✪
	Accumulated Surplus or (Deficit)	$ ✪	$ ✪
	Justification for any Accumulated Surplus (Deficit)	Please detail ✪	Please detail ✪

10	GRANT FUNDING PROFILE	Most Recent Completed Year	This Application
	Richmond Grant	$ ✪	$ ✪
	Other Grants (Federal, Provincial, Municipal)	$ ✪	$ ✪
	Total Grants	$ ✪	$ ✪
	Grant Surplus	$ ✪	$ ✪
	Justification for Accumulated Surplus (Deficit) Involving Previous City Grant	Please detail ✪	Please detail ✪

11	PROPOSED CITY GRANT BUDGET	This Application
	☐ OPERATING ASSISTANCE	For A- $ ✪ For B- $ ✪ For C- $ ✪ Total - $ ✪
	☐ COMMUNITY SERVICE (E.G., EVENT, PROGRAM, PROJECT)	For A- $ ✪ For B- $ ✪ For C- $ ✪ Total - $ ✪
	☐ Total Grant Revenue	$_____
	☐ Total Grant Expense	$_____

12	Recommended Grant	For A- $ ✪ For B- $ ✪ For C- $ ✪ Total - $ ✪
13	Conditions / Comments	
14	Reason	This grant is provided or not provided because: Please detail ✪
15	Assessor	

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