



Policy Name: Fee for Service Policy

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Date Adopted: February 4, 2014	Motion No.	14-04-12
Date Amended: November 6, 2017	Motion No.	2017-28-12
Date Amended: November 19, 2018	Motion No.	2018-24-20
Date Amended: October 16, 2023	Motion No.	2023-39-23

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### 1. Purpose

The Fee for Service Policy aims to ensure a fair and transparent framework for providing financial support to local registered non-profit organizations whose services align with the District of Tumbler Ridge's goals. This support will be facilitated through an annual fee established by an up to three-year contract to contribute to community advancement and enhance residents' well-being.

### 2. Scope

Fee for Service agreements serve to allocate funds to non-profit organizations offering essential or desirable services within the District. These agreements enable the District to leverage the specialized skills and knowledge of local non-profit groups, resulting in cost-effective delivery of services when compared to direct municipal provision.

The proposed services must be provided by the applicant organization.

### 3. Principles

Priorities will be assigned to requests for assistance in accordance with the following principles:

- a) Well-Managed Assistance: Council will strive to provide assistance only where it is needed and where it is deemed to be well-managed.
- b) Alignment with District's Goals: Services must align with the District's goals and contribute to its development.
- c) Inclusivity and Accessibility: Services must be available to many residents, promoting fairness and equal access.
- d) Support for Community Values: Services must uphold community values, foster unity, and benefit residents' well-being.
- e) Respectful and Non-Offensive: Services must treat all individuals and groups with respect, avoiding any offensive content.

## **4. Procedure**

### **4.1. Application**

- a) Requests for Fee for Service funding must be submitted to the attention of the District's Finance Department.
- b) Deadline: The applications must be submitted by the second Friday of January to be considered in the same calendar year.

Note: Late applications may not be considered.

- c) Council will decide on applications and provide all final approvals by March 31 of each year

### **4.2. Eligibility**

4.2.1. The organization applicant must meet all the following criteria:

- a) Be registered as a not-for-profit incorporated organization in British Columbia;
- b) Be located in Tumbler Ridge;
- c) Demonstrate that they can match the District's contribution in either other donation dollars or in-kind services;
- d) Demonstrate that it has sound financial and administrative management;
- e) Demonstrate a financial need for the funding; and
- f) Have a proven track record of community service and have previously demonstrated the ability to administer funding or other form of assistance.

4.2.2. The services must be aligned with the principles outlined in Section 2 of this policy.

4.2.3. The person signing the application or receiving the funds must be legally authorized to act on behalf of the society or organization.

4.2.4. Any of the following organizations and services will be ineligible if they are attributed to:

- a) Direct funding to individuals;
- b) Services that would have been previously supported through other government funding (including Education and Health Care sectors);
- c) Demonstrations, marches and rallies;
- d) For-profit organizations, or with the purpose of competing with a business;
- e) Retroactive funding or operating deficits;

- f) Capital projects on District-owned property;
- g) Organizations with discriminatory membership eligibility criteria.

4.2.5. All eligible applications will be forwarded to Council for consideration.

4.2.6. Organizations with ineligible applications will be notified by the District without further review by the Council.

### **4.3. Requirements**

#### **4.3.1 Documents for Application**

The application must include the following documents:

- a) Application Form (Schedule A);
- b) Declarations (Schedule B);
- c) Questionnaire (Schedule C);
- d) Current financial statement prepared and signed by a Certified Public Accountant (CPA) or designated signing authority for the organization;
- e) The list of the Board of Directors as shown in the minutes of the last Annual General Meeting held by the organization;
- f) Copy of the organization's Constitution and/or Governing Bylaws; and
- g) Report on how the funding received in the previous year was utilized.
- h) A detailed consolidated budget for the entire organization, including revenues/expenditures, and a specific budget for the services requesting assistance; and
- i) Business plan or statement of objectives.

#### **4.3.2. Additional Requirements for Assistance above \$12,000.00 per year**

Itemized breakdown of funds intended for salaries, detailing position title, wages, benefits, and gross position expenses.

#### **4.3.3. Presentation to Council**

Applicants may be provided with an opportunity to present to Council at a Council meeting before final deliberation.

#### **4.3.4. Acknowledgment of the District's Contribution**

The District's contribution must be acknowledged on all promotional materials relating to the funded service.

Note: The services cannot be represented as an activity of the District and the Applicant does not have authority to represent itself as an agency of the District.

#### **4.4. Rationale for Additional Funds**

If requesting a Fee for Service funding beyond the original amount, the organization must provide a rationale for the additional funds.

#### **4.5. Reporting requirements**

##### **4.5.1. Quarterly Progress Report**

Organizations receiving funding above \$12,000 annually must submit a Quarterly Progress Report, which serves as a comprehensive document detailing the service's execution, accomplishments, and impact on the community within the designated quarter.

##### **4.5.2. Final Report**

At the end of the project, all successful applicants must complete a Final Report for Council, which must:

- a) Be submitted to the District's Finance Department by March 31 of the following year.
- b) Demonstrate how many individuals accessed or participated in the activity and what the benefits were to the community;
- c) Provide financial records detailing all expenditures facilitated by the District contribution; and
- d) Detail the methods by which the District's assistance was acknowledged.

4.5.3. Any surplus funds from the District contribution must be returned with the report.

4.5.4. Further assistance may not be provided to the organization or society until the report has been received and reviewed.

#### **4.6. Payment Schedule**

Upon approval of the Fee for Service application, the funds will be disbursed based on the following:

- a) All applications up to \$12,000.00 will be eligible for disbursement upon Council approval.
- b) For applications over \$12,000.00, funds will be released on a quarterly basis, only after the Quarterly Progress Report is submitted by the organization and reviewed by the District's Finance Department.



**SCHEDULE A – Application Form**

**Deadline for applications: Second Friday of January**

**General Information:**

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

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

Submit to:  
District of Tumbler Ridge  
Finance Department  
P.O. Box 100  
Tumbler Ridge BC  
VOC 2W0



**SCHEDULE B - DECLARATIONS**

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

Signature	Position	Date

I hereby declare that if our organization is successful in obtaining the District of Tumbler Ridge Fee for Service funding, we grant the District of Tumbler Ridge (or a third party appointed by the District) the right to review the services for which the Fee for Service funding was obtained, to ensure that the funds were used for the stated purpose(s) set out in this application. If suspected mismanagement or fraud relating to funding, the Council of the District of Tumbler Ridge must be notified immediately.

Signature	Position	Date



## SCHEDULE C – QUESTIONNAIRE

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### **\*Orientation\***

Thank you for expressing interest in the Fee for Service funding. We value your commitment to enhancing our community through your proposed services.

- When responding to the following questions, we kindly request you to be as thorough and specific as possible.
- Avoid general or vague answers, as they may not adequately showcase the uniqueness and impact of your proposal.
- All the questions must be answered. If it is not applicable, please explain why.

By providing specific details, you will help us gain a clearer understanding of your organization's objectives, the intended benefits for the community, and how the Fee for Service funding can contribute to the success of your initiative.

### **1) General Information**

- a) Describe the operation and history of your organization.
- b) Describe the specific activity to which the Fee for Service funding would be applied.
- c) How was the need for your proposal identified, and how will the activity meet this need?
- d) How will this proposal benefit the community and be aligned with the District's strategic priorities? For example:
  - Promoting the enhancement of community identity and pride locally
  - Encouraging and expanding volunteerism
  - Promoting healthy living
  - Promoting history, arts, culture, and roots
  - Ensuring sustainability for the community, including financial stability
  - Enhancing the quality of life for residents.
  - Event/Program Awareness and Outcomes
- e) How will participants or beneficiaries become aware of these services?
- f) What are the expected outcomes of the proposed activity?
- g) List the number of citizens served by your organization in the past two years and the number expected to be served during the three years following receipt of this Fee for Service Contract, if approved. Please provide any other relevant statistics.

**2) Evaluation and Uniqueness**

- a) How will you evaluate your proposed activity after the services?
- b) Identify any similar services offered in the District and describe how your proposed activity is unique.

**3) Collaboration and Governance**

- a) List any organizations with whom you collaborate or partner to provide services.
- b) Please indicate how your organization will recognize the District's contribution to your services.
- c) Please describe the governance structure of your organization.

**4) Financial and Membership Information**

- a) Please describe the financial controls and administrative management process in your organization.
- b) Please describe the organization's financial need for District funding assistance for this proposal.
- c) What are the total annual revenues for your organization?
- d) Will this activity be completed within three years from the receipt of the District Fee for Service Contract?
- e) Will this Fee for Service be used to pay District property tax?
- f) Will this Fee for Service funding be used to fund staff training and professional development? If so, please provide details.
- g) Please describe your organization's membership criteria, detail how many members you have, and indicate which volunteer activities the organization undertakes.
- h) Does your organization have paid staff? If so, how many staff members in total? (If District Fee for Service contribution is used towards salaries and wages, please submit a Schedule specifying approved actual and budgeted salaries and benefits per staff member).

**5) Contingency and Previous Funding**

- a) Outline your contingency plan if this funding application is not approved.
- b) Please list any assistance your organization has received from the District in the previous four years.
- c) What previous sources of funding have you administered from sources other than the District?



**6) Marketing and Goals**

a) Please describe the marketing and self-financing activities of your organization. Where do the organization's revenues come from, and approximately what percentage is derived from each source?

b) What are your organization's overall goals and objectives for the coming three years?

**\*Conditions\***

- If the assistance isn't fully used for the stated purposes or is no longer needed for the project, the extra funds must be returned to the District's Finance Department.
- Applications above \$12,000.00 require Quarterly Progress Reports. Funds will be released quarterly after these reports are submitted by the successful applicant and reviewed by the District's Finance Department.
- The successful applicant must send a Final Report to the District's Finance Department by March 31 of the following year. Not submitting this report may affect future assistance.
- Please note that the project or event can't be claimed as a District's activity, and the applicant can't act as an agency of the District.

Signature:

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Date:

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**DISTRICT OF TUMBLER RIDGE**  
**Fee for Service Policy**

**SCHEDULE D – Application Review (For internal use only)**

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