

NO: R258

COUNCIL DATE: December 16, 2024

REGULAR COUNCIL

TO: **Mayor & Council**

DATE: **December 11, 2024**

FROM: **General Manager, Finance**

FILE: **1850-20**

SUBJECT: **City Grants Policy – Proposed Amendments**

RECOMMENDATION

The Finance Department recommends that Council approve the amendments to the Policy on City Grants D-26 (the “Policy”), as outlined in this report.

INTENT

The intent of this report is to seek approval from Council to update the Policy on City Grants.

BACKGROUND

The Policy on City Grants, attached as Appendix “I”, was first adopted by Council in 1979 and was last amended in May 2005. The purpose of the Policy is to provide governance and guidance for the utilization of the funds from the City Grants Program to financially support local non-profit and community-based organizations.

During the Regular Council Public Hearing meeting held on July 22, 2024, Council established a City Grants Task Force (“Task Force”) to review the City’s granting programs and bring forward a report with recommendations to update the Policy on City Grants. The Task Force was comprised of four Councillors with support from City staff. The focus of the Task Force was to make recommendations that will enhance accountability and transparency in the use of the funds from the City Grants Program.

DISCUSSION

A review of the current Policy was undertaken by the Task Force to explore solutions and develop recommendations to bring overall efficiencies and ensure the City Grants Program aligns with the City’s objectives and priorities. The proposed changes to the Policy from the Task Force are summarized below. The proposed Policy on City Grants is attached as Appendix “II” to this report, and the red-lined version summarizing the proposed changes to the Policy is attached as Appendix “III” to this report.

1. Paragraph 1 – Revise Naming Convention for Category A and Category B

To improve clarity in disclosure of grant funding amounts, the naming convention for the two categories of grants should be revised to:

- **Category A** – Lease-in-Kind grants, segregated into short-term and long-term; and
- **Category B** – All other grants (e.g. Community Grants, Sport Surrey Grants, Neighbourhood Enhancement Grants, Event Grants, Business Beautification Grants, and Arts & Culture Grants, etc.)

2. Establish a Maximum Funding Limit

The Task Force identified the need to establish a maximum funding limit per application for the City Grants Program, and proposes a maximum funding limit of \$5,000 per eligible City Grants request, with the following exceptions:

- Applications where an existing active Operating Agreement is in place between the City and the applicant outlining specific grant funding for the applicant;
- Grant programs with maximum grant funding per application in excess of \$5,000 approved by Council through a Corporate Report (e.g. Arts & Cultural Grant Program (Corporate Report No. R238; 2012 Surrey Cultural Grants Program) and Community Events Policing Grant Program (Finance Committee Report No. F013; 2015 Grants to Offset Policing Costs for Community Events));
- Applications relating to City-wide events; and
- Any other exceptions with a simple majority support of Council.

In addition to the recommendations brought forth by the Task Force, City staff have made minor wording and housekeeping updates to the Policy to improve clarity in interpretation.

CONCLUSION

Based on the above discussion, it is recommended that Council approve the proposed amendments to the Policy on City Grants attached as Appendix “II” to this report.

Kam Grewal
CFO / General Manager, Finance

Appendix “I”: Current Policy on City Grants (May 30, 2005)
Appendix “II”: Proposed Policy on City Grants
Appendix “III”: Red-lined version of Policy on City Grants



CITY POLICY

REFERENCE:

REGULAR COUNCIL MINUTES
6 MARCH 1979`
PAGE 7

APPROVED BY:

CITY COUNCIL

DATE: 30 MAY 2005 (R05-1363)

HISTORY: 06 SEPT 1994 (RES94-3135)
19 APR 1993, 28 JAN 1991,
26 MAR 1979

TITLE: CITY GRANTS

POLICY ON CITY GRANTS

1. That two categories of grants be established:
 - Category A - ongoing grants from year-to-year.
 - Category B - all other grants generally for one-time requests.
2. That a Global Grants Budget be placed in the Annual Financial Plan.
3. That total grants not exceed the Global Grants Budget.
4. That grants be intended for specific programs, capital projects, or special events.
5. That all applications for grants must be received at the office of the City Clerk not later than 4:30 p.m., September 30th of each year, or if the City Hall is closed on that day, on the next following day on which the City Hall is open. Grant applications received after that time will not be considered for funding unless the requirement for funding was not reasonably foreseeable prior to September 30th, and unless the requirement for funding is critical to the survival of the organization's programs, capital project, or special event.
6. That grants not be provided to groups for travel, save and except for groups travelling under the Sister City Program.
7. That a Grant Fund in the amount of \$5,000 be established as a Special Recognition Fund for groups, which have achieved extraordinary accomplishments as determined by Council throughout the year.

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8. That organizations providing services that are the responsibility of other levels of government will not normally be eligible for grants unless the consequences of not funding the grant would result in a significant disadvantage to Surrey which would outweigh the cost of the grant itself. (Example: An organization would lose significant funding from other benefactors without Surrey's participation by way of a nominal grant).
 9. That grants not be provided to cover deficits or on-going operating costs.
 10. Criteria For Grant Eligibility:
 - (a) The organization must meet the requirements of Sections 8, 24 and 25 of the *Community Charter*.
 - (b) The organization shall have an active governing body composed of volunteers. Its main responsibility shall be program and policy development, and fund-raising. The governing body must be held responsible for the effectiveness of services provided and for financial accountability for funds received from all sources.
 - (c) All organizations shall have the following or similar clauses in their constitution and bylaws:
 - i. Paid staff members cannot be voting members of the Board of Directors (or the governing body).
 - ii. No Director shall be remunerated for being or acting as a Director, but Directors may be reimbursed for all expenses necessary and reasonably incurred while carrying out their duties as authorized by the organization.
 - (d) The organization shall show evidence that it has fully explored all other viable sources of financial support.
 - (e) The organization must extend its service to the general public in Surrey, and must not exclude anyone by reason of race, religion, or ethnic background.
 - (f) The organization must not act as a general fund-raiser for, or make grants to, various other groups or organizations.
 - (g) The organization must agree to submit an evaluation of the use of the Surrey grant at the end of the program/project/event, or by September 30th, whichever occurs sooner.
 - (h) The organization must not view the grant as an automatic ongoing source of funding.

GUIDELINES FOR GRANT PRIORITIES

The following factors will be used to determine priorities for allocating grants to eligible applicants:

1. The need addressed by the program/project/event, and its value to the community:
 - To what degree will the grant promote the well-being of Surrey residents?
 - How many residents will benefit?
 - Why is it important that it be done this year?
 - How severe are the consequences to Surrey residents of not providing a grant?
 - Is there overall community support?
2. The absence of duplication of, or competition with, an existing City program/service/event, and the use of existing community services or facilities to carry out the program/service/event.
3. The cost of the program/project/event:
 - What is the total cost?
 - What is the per capita cost (residents served)?
 - What are the sources of funding, and what percentage would Surrey be contributing?
 - Have all possible sources of funding been pursued?
 - What are the overall financial conditions of the organization, and will the lack of Surrey funding result in cancellation of the program/project/event?
 - Is this a one-time request for funds, or will ongoing support be required?
 - If ongoing support will be required, for how long and to what degree?
4. The appropriateness, effectiveness, and quality of delivery of the program/project/event:
 - How well will it be organized?
 - How many volunteers and volunteer hours will be involved?
 - Will there be coordination with other organizations, which might be interested or affected?
 - Has the organization previously demonstrated success with a similar undertaking?

5. The quality of the organization's previous and current administration and management, and the length of time and the degree to which the organization has provided previous service to the community:
- Who are the officers or elected officials of the organization?
 - Is the organization well-known to Surrey residents for their service?
 - What is their history of service to Surrey?
 - What are the future plans and goals of the organization?
 - Has the organization previously received funds from Surrey, and did they submit an evaluation for the use of those funds?

PROCEDURE FOR PROCESSING GRANT REQUESTS

1. Applicants must submit a grant application to the City Clerk on the prescribed form, by September 30th in order to be considered for a grant for the following year.
2. A Grants Evaluation Committee, consisting of a staff representative from Finance, Parks, Recreation, Culture and Corporate Services, will review all grant applications to ensure completeness and to ensure grant eligibility as specified by policy.
3. New grant requests shall be listed under the following categories:
 - Taxes
 - Community Promotion
 - Environmental
 - Cultural and Recreational
 - Health and Social Services
4. The Grants Evaluation Committee will (after consultation as they deem necessary with the grant applicants, with City General Managers or their staff, with other Surrey Committees or Commissions, or with community groups) submit to the Finance Committee of Council, a list of all grant applications along with recommended grant amounts. The total of the recommended grants shall not exceed the total grants budget funding available, and a minimum of \$10,000 of the grants budget shall remain unallocated for critical, unanticipated grant requests received after September 30th.
5. The Finance Committee of Council will review the recommendations of the Grants Evaluation Committee, and may request additional information or request to hear delegations. The Finance Committee will then submit a list of recommended grant amounts to Council for their review and for the necessary approval. The approved grants shall be subject to final confirmation by Council after all appeals have been dealt with.
6. The City Clerk shall notify all applicants, by regular mail, of Council's initial decision, and shall advise them of the Appeal Procedure. Applicants shall be advised that grant amounts are subject to final confirmation by Council after all appeals have been dealt with.
7. The Grants Evaluation Committee shall be responsible for ensuring that all organizations, which receive a grant, submit an evaluation report on the use of the grant funds.

PROCEDURE FOR GRANT APPEALS

Appeals of Council's decisions will be considered only in instances where additional grant funds are required to prevent unforeseen circumstances which could result in employee lay-offs or threaten the financial well-being or survival of the organization, or where significant new information will be presented which was not available during the grants review process.

Organizations must notify the City Clerk in writing, within 14 days from the date that the grant notifications were mailed, that they wish to appeal Council's decision. The grant applicants must give a clear explanation of why they feel they qualify for an appeal. The appeal request will be presented to Council for a decision on whether the appeal will be considered, and the applicant shall be notified accordingly.

If the appeal is not successful, that organization may not reapply for funding of the same service in the same funding year.

PROCEDURE FOR PROCESSING LATE GRANT APPLICATIONS

Grant applications received after the September 30th deadline will be referred to the Grants Evaluation Committee for the following action:

- (a) If the requirement for grant funds was not reasonably foreseeable prior to September 30th, and if the requirement for immediate funding is critical to the survival of the organization or the event, then the Grants Evaluation Committee may refer the application to Council along with a recommended grant amount.
- (b) If the Grants Evaluation Committee believes that the grant application does not qualify for consideration under 5, then the Committee shall advise the grant applicant in writing that they do not qualify for consideration, but that they may reapply by the September 30th deadline for the following year. The applicant shall be advised that they may appeal this action of the Committee by requesting the City Clerk in writing to refer their application directly to Council, and by explaining why they should receive special late consideration for a grant. The appeal will be forwarded to Council for consideration, along with a recommendation from the Grants Evaluation Committee.

PROCEDURE FOR SETTING A GLOBAL GRANTS BUDGET

Prior to September 30th of each year, the Grants Evaluation Committee shall review the present year's budget, consult with larger ongoing grant recipients as necessary, and then submit a recommended global grants budget to the City Manager. The City Manager shall review the recommendation, and include a Global Grants Budget amount in the preparation of the Annual Financial Plan.



CITY POLICY

No. D-26

REFERENCE:	APPROVED BY:	CITY COUNCIL
REGULAR COUNCIL MINUTES 6 MARCH 1979` PAGE 7	DATE:	16 DEC 2024
	HISTORY:	30 May 2005 (R05-1363), 06 SEPT 1994, 19 APR 1993, 28 JAN 1991, 26 MAR 1979

TITLE: CITY GRANTS (PROPOSED)

POLICY ON CITY GRANTS

1. That two categories of grants be established:
 - **Category A** – Lease-in-Kind grants, segregated into short-term and long-term; and
 - **Category B** - All other grants (e.g. Community Grants, Sport Surrey Grants, Neighbourhood Enhancement Grants, Event Grants, Business Beautification Grants, and Arts & Culture Grants, etc.).
2. That the City Grants budget be placed in the Annual Financial Plan.
3. That total grants not exceed the City Grants budget.
4. That grants be intended for specific programs, capital projects, or special events.
5. That all applications for grants must be received at the office of the City Clerk not later than 4:30 p.m., September 30th of each year, or if the City Hall is closed on that day, on the next following day on which the City Hall is open. Grant applications received after that time will not be considered for funding unless the requirement for funding was not reasonably foreseeable prior to September 30th, and unless the requirement for funding is critical to the survival of the organization's programs, capital project, or special event.
6. That a Grant Fund in the amount of \$5,000 be established as a Special Recognition Fund for groups, which have achieved extraordinary accomplishments as determined by Council throughout the year.

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7. That organizations providing services that are the responsibility of other levels of government (e.g. provincial or federal) will not normally be eligible for grants unless the consequences of not funding the grant would result in a significant disadvantage to Surrey which would outweigh the cost of the grant itself (e.g. An organization would lose significant funding from other benefactors without Surrey's participation by way of a nominal grant).
 8. That grants not be provided to cover deficits or on-going operating costs (e.g. rent, internal staff salaries, utilities, etc.).
 9. Criteria For Grant Eligibility:
 - (a) The organization must meet the requirements of Sections 8, 24 and 25 of the *Community Charter*.
 - (b) The organization shall have an active governing body composed of volunteers. Its main responsibility shall be program and policy development, and fund-raising. The governing body must be held responsible for the effectiveness of services provided and for financial accountability for funds received from all sources.
 - (c) All organizations shall have the following or similar clauses in their constitution and bylaws:
 - i. Paid staff members cannot be voting members of the Board of Directors (or the governing body).
 - ii. No Director shall be remunerated for being or acting as a Director, but Directors may be reimbursed for all expenses necessary and reasonably incurred while carrying out their duties as authorized by the organization.
 - (d) The organization shall show evidence that it has fully explored all other viable sources of financial support.
 - (e) The organization must extend its service to the general public in Surrey, and must not exclude anyone by reason of race, religion, or ethnic background.
 - (f) The organization must not act as a general fund-raiser for, or make grants to, various other groups or organizations.
 - (g) The organization must agree to submit an evaluation of the use of the Surrey grant at the end of the program/project/event, or by September 30th, whichever occurs sooner.
 - (h) The organization must not view the grant as an automatic ongoing source of funding.

10. That a maximum funding limit per application of \$5,000 be established for all Category B grants, with the following exceptions:
- Applications where an existing active Operating Agreement is in place between the City and the applicant outlining specific grant funding for the applicant;
 - Grant programs with maximum grant funding per application in excess of \$5,000 approved by Council through a Corporate Report (e.g. Arts & Cultural Grant Program (Corporate Report No. R238; 2012 Surrey Cultural Grants Program) and Community Events Policing Grant Program (Finance Committee Report No. F013; 2015 Grants to Offset Policing Costs for Community Events));
 - Applications relating to City-wide events; and
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GUIDELINES FOR GRANT PRIORITIES

The following factors will be used to determine priorities for allocating grants to eligible applicants:

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3. The cost of the program/project/event:
 - What is the total cost?
 - What is the per capita cost (residents served)?
 - What are the sources of funding, and what percentage would Surrey be contributing?
 - Have all possible sources of funding been pursued?
 - What are the overall financial conditions of the organization, and will the lack of Surrey funding result in cancellation of the program/project/event?
 - Is this a one-time request for funds, or will ongoing support be required?
 - If ongoing support will be required, for how long and to what degree?
4. The appropriateness, effectiveness, and quality of delivery of the program/project/event:
 - How well will it be organized?
 - How many volunteers and volunteer hours will be involved?
 - Will there be coordination with other organizations, which might be interested or affected?
 - Has the organization previously demonstrated success with a similar undertaking?

5. The quality of the organization's previous and current administration and management, and the length of time and the degree to which the organization has provided previous service to the community:

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- (b) If the Grants Evaluation Committee believes that the grant application does not qualify for consideration under (a), then the Committee shall advise the grant applicant in writing that they do not qualify for consideration, but that they may reapply by the September 30th deadline for the following year. The applicant shall be advised that they may appeal this action of the Committee by requesting the City Clerk in writing to refer their application directly to Council, and by explaining why they should receive special late consideration for a grant. The appeal will be forwarded to Council for consideration, along with a recommendation from the Grants Evaluation Committee.

PROCEDURE FOR SETTING A CITY GRANTS BUDGET

Prior to September 30th of each year, the Grants Evaluation Committee shall review the present year's budget for any necessary updates, and then submit a recommended City grants budget to the City Manager. The City Manager shall review the recommendation and include a City Grants budget amount in the preparation of the Annual Financial Plan.



CITY POLICY

No. D-26

REFERENCE:

REGULAR COUNCIL MINUTES
6 MARCH 1979`
PAGE 7

APPROVED BY: CITY COUNCIL**DATE:** ~~30-16 MAY-DEC 2005~~24 (R05-1363)

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2. That ~~the~~Global-City Grants Budget be placed in the Annual Financial Plan.
3. That total grants not exceed the ~~Global-City~~Global-City Grants Budget.
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PROCEDURE FOR PROCESSING GRANT REQUESTS

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2. A Grants Evaluation Committee, consisting of ~~a~~ staff representatives from Finance, Parks, Recreation, ~~&~~ Culture, ~~and~~ Corporate Services, and Social Infrastructure and Community Investment will review all grant applications to ensure completeness and to ensure grant eligibility as specified by policy.
3. New grant requests shall be listed under the following categories:
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If the appeal is not successful, that organization may not reapply for funding of the same service in the same funding year.

PROCEDURE FOR PROCESSING LATE GRANT APPLICATIONS

Grant applications received after the September 30th deadline will be referred to the Grants Evaluation Committee for the following action:

- (a) If the requirement for grant funds was not reasonably foreseeable prior to September 30th, and if the requirement for immediate funding is critical to the survival of the organization or the event, then the Grants Evaluation Committee may refer the application to Council along with a recommended grant amount.
- (b) If the Grants Evaluation Committee believes that the grant application does not qualify for consideration under ~~5(a)~~, then the Committee shall advise the grant applicant in writing that they do not qualify for consideration, but that they may reapply by the September 30th deadline for the following year. The applicant shall be advised that they may appeal this action of the Committee by requesting the City Clerk in writing to refer their application directly to Council, and by explaining why they should receive special late consideration for a grant. The appeal will be forwarded to Council for consideration, along with a recommendation from the Grants Evaluation Committee.

PROCEDURE FOR SETTING A ~~GLOBAL-CITY~~ GRANTS BUDGET

Prior to September 30th of each year, the Grants Evaluation Committee shall review the present year's budget, ~~consult with larger ongoing grant recipients as necessary for any necessary updates~~, and then submit a recommended ~~global-City~~ grants budget to the City Manager. The City Manager shall review the recommendation, and include a ~~CityGlobal~~ Grants ~~b~~Budget amount in the preparation of the Annual Financial Plan.