



Policy No. 16-2020 (BP- Pemberton and District Initiative Fund)

Pemberton and District Initiative Fund Policy

Purpose

The intent of this policy is to:

- establish guidelines and criteria for the Pemberton and District Initiative Fund (PDIF) Program including eligibility, application process and reporting requirements;
- ensure equitable and fair distribution of funds to all organizations/groups in the service area which is comprised of the Village of Pemberton (“Village”) and Squamish-Lillooet Regional District (SLRD) Electoral Area C, excluding the WedgeWoods neighbourhood (“District”—which is to be used interchangeably with SLRD throughout);
- establish the priority by which an application will be considered for funding in order for a funding application to be advanced to the Pemberton Valley Utilities and Services Committee (PVUS) and/or the SLRD Board for consideration.

Objective

The objective of the PDIF Program is to provide seed, long-term or one-time/single event/fee waiver funding to assist local not-for-profit organizations, entities or societies based within the Village and/or SLRD Electoral Area C that are contributing to the community through the initiation, development, advancement, or support of initiatives that enhance the well-being of the constituents of the Village and SLRD Electoral Area C.

The PDIF Program utilizes two separate funding streams—one stream for Economic Development-type programming, and one stream for Arts, Culture & Recreation-type programming, as follows:

Economic Development	Arts, Culture & Recreation
• Community economic development and/or diversification	• Cultural development and/or opportunities
• Creation of potential long-term employment	• Advancement of sports and recreation programming for all age-groups
• Business Development and/or Strategizing	• Advancement of arts, music and craftsmanship programming for all age-groups
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Policies Superseded: PDCF Policy 2.13	Related Enactments:

• Promotion of the Village and SLRD Electoral Area C / District

The PVUS Committee annually distributes funds to recreation, social, cultural and economic development activities throughout Pemberton and SLRD Electoral Area C. This funding, previously provided by the SLRD’s Pemberton and District Community Fund program (jointly funded by the Village and SLRD Electoral Area C, the Village’s Community Initiative and Opportunity Fund (CIOF) program, and the use of certain Electoral Area C Select Funds), replaces those programs and is intended to supplement, support or assist community-based not-for-profit organizations and the activities they carry out. All organizations who receive this funding are not-for-profit organizations, community groups, entities or societies based within Pemberton or SLRD Electoral Area C that are considered by PVUS to be contributing to the general interest, benefit and well-being of its residents.

Definitions

For the purpose of this policy the following definitions apply:

“Arts, Culture and Recreation Programming” means activities, actions or programs which further the expression or application of human creative skill and imagination, and also includes activities involving physical exertion.

“Economic Development Programming” means activities, actions or processes of creating and utilizing physical, human, financial, and social assets to generate improved and broadly shared economic well-being and quality of life for the community.

“Long-Term Agreement Funding” means an agreement entered into between the SLRD and an organization or group whereby the PDIF provides regular, annual funding, at a predetermined and agreed to amount, from the PDIF service consistently over a multi-year period to be identified in the Long-Term Service Agreement and renegotiated as per an established schedule.

“One-Time Funding” means funding provided from the PDIF for a specific event, program or project that does not require a commitment of funds on a short or long-term basis.

“Seed Funding” means funding that is provided from the PDIF to an organization/group for support or assistance on a short-term basis to help start a new program or project that meets with the criteria as established in this policy, with the intent that the entity is self-sustaining at the end of the seed funding agreement. This funding is not provided on a consistent, regular or long-term basis and is reduced by an amount established in any corresponding funding agreement each year.

“Fee Waiver Funding” means funding that is provided from the PDIF to an organization/group for support or assistance on a short-term basis to cover fee waivers or reduction in rental fees as per the Existing [Fees and Charges Bylaw](#) .

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“Existing Fees and Charges Bylaw” means the [Squamish-Lillooet Regional District Pemberton and District Recreation Service Fees and Charges Bylaw](#) that is in effect as of the date the Fee Waiver Funding request is received.

Priorities

Priority for funding will be given to applications for programming that will:

- Support and facilitate **Economic Development Programming** in Pemberton and Electoral Area C through locally supported projects or programs which:
 - Help create employment opportunities for local residents;
 - Establish programs that enhance the Pemberton and District profile with an aim to support the tourism industry and local business;
 - Build upon community strengths and partnerships.
 - *Note, PDIF funding requests to fund employment positions within a respective organization do not necessarily constitute job creation under the **Economic Development Programming** stream. Rather, the overall purpose of the organization or the organization’s programming will be considered when determining the applicable funding stream for the organization/request.*
- Support and facilitate **Arts, Culture and Recreation Programming** in Pemberton and Electoral Area C through locally supported projects or programs which:
 - Help foster a supportive environment for the development of arts, culture and recreation programming and opportunity;
 - Strengthen and enhance the well-being of the community within the area of sports, recreation, education, arts and culture;
- Offer a unique experience not duplicated by other ongoing organizations and their activities;
- Be open and / or accessible to the public;
- Promote volunteer participation and citizen involvement;
- Promote the use of new approaches and techniques in the solution of community needs;
- Help the organization to achieve financial independence with an aim to be self-reliant.

Eligibility

An eligible applicant must:

- Be a not-for-profit organization, community group, entity or society and / or activity in good standing which enhances the quality of life for Pemberton and District residents;

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- Be a local organization within the Village of Pemberton or District, or be an organization that is undertaking an activity/project that will benefit the Pemberton and District area;
- Demonstrate that the service provided fills a need in the community and that there is no overlap with existing services;
- Demonstrate fiscal responsibility and effective management;
- Demonstrate a commitment to the community.

For grants equal to or in excess of \$1,500, priority will be given to leveraged funding that creates additional financial value by securing one or more of the following on an annual basis:

- Funding from other governments;
- Funding from other sources;
- Corporate sponsorships;
- Matching funds of the applicant;
- In kind contributions from sources other than the applicant.

Applicants should raise a minimum of 50% of their annual budget from other sources beyond PDIF funding (unless requesting less than \$1,500).

Applicants cannot apply for further funding through the Village of Pemberton’s Community Enhancement Fund if funding has been provided through PDIF.

Eligible Projects and Expenditures

PDIF funding will be provided for, but is not limited to, the following:

- Wages, honourariums, contract services, promotions and marketing purposes, special events, projects and/or activities, and strategic or business plan development;
- Equipment, tools or supplies.
- League or club-based sports programs eligible for funding consideration must be self-sustaining through membership or league fees. Only special projects, programs, positions or events related to league or club-based sports programs are eligible for PDIF funding.
- fee waivers or reductions in rental fees as per the Existing [Fees and Charges Bylaw](#).

Eligible projects or expenditures will:

- Be provided to the Village and District residents without exclusion to anyone by reason of religion, ethnicity, gender, age, sexual orientation, language, disability or income;

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- Be for a specific service, use or project (i.e. not 'general revenue'), and will provide enrichment and benefit to the community;
- To the extent possible, seek to employ or utilize local services, products and labour.

Ineligible Organizations, Projects and Expenditures

Ineligible applicants, projects and expenditures under the PDIF program include the following:

- Commercial or for-profit ventures or businesses;
- Retroactive funding, for any project expenses to be incurred prior to approval of funding;
- Debt retirement, reserve contributions, or mortgage or financing pay-downs;
- Large scale capital and public infrastructure projects*;
- The ongoing, fundamental operations of league or club-based sports programs;
- Prize money;
- Organizations, groups or entities already receiving funding from the Village of Pemberton or SLRD through annual recurring funding, programs or other funding contributions;
- The purchase of alcohol or cannabis.

** Large scale capital and public infrastructure projects may be considered in certain circumstances at the discretion of the SLRD/PVUS Committee if matching funds are confirmed from other/external funding sources, and if the PDIF program has sufficient funding to cover such projects. Applicants who may wish to apply for large scale capital project funding should consult further with SLRD or Village staff prior to submitting an application.*

Funding Allocation

The source of funds for PDIF will be generated through taxation and identified on the SLRD and Village websites and financial plans to ensure property owners within the PDIF service area are clearly able to identify how much of their annual property taxes are being allocated to the PDIF.

The requisition limits for each stream are set in the service establishing bylaws as being the greater of a specific flat rate or an amount equal to the amount that could be raised by a property value tax rate at a set rate per thousand applied to the net taxable value of land and improvements (i.e. the mill rate). The requisition limits for each stream are as follows:

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- Squamish-Lillooet Regional District Pemberton and District Arts, Culture and Recreation Service Establishing Bylaw No. 1643-2019:

The greater of:
 75, 000.00 *OR*
 Mill rate: \$0.0475/\$1,000

- Squamish-Lillooet Regional District Pemberton and District Economic Development Service Establishing Bylaw No. 1644-2019:

The greater of:
 \$50,000.00 *OR*
 Mill rate: \$0.0317/\$1,000

Based on the requisition limits, the budget for the PDIF Program will be established annually by the SLRD Board of Directors. From year to year, adjustments to the requisition limits and associated approved budgets (once determined) will be made available on the SLRD website and on the Village website.

Funding applicants must determine which funding stream their application falls under based on the purpose of their organization and its programming. The SLRD reserves the right to change the funding stream an application is made under based on its review of the respective application/applicant.

Approval Process

Funding applications for **Long-Term, Seed and One-Time Funding Requests** will be considered for approval by the SLRD Board of Directors based on recommendations from PVUS. PVUS may approve funding applications on its own if it has been delegated the authority to do so by the SLRD Board.

The SLRD will aim to set aside approximately 25% of total annual service funding to provide for **One-Time Funding Requests**, but does not guarantee this amount. Any funds set aside for **One-Time Funding Requests** that remain undisbursed at the end of the fiscal year will carry over as PDIF reserve funds in the subsequent fiscal year.

In 2023 by resolution and otherwise as part of its annual budgeting process, the SLRD will allocate an amount of total annual service funding to provide for **Fee Waiver Requests**. Any funds allocated for **Fee Waiver Requests** that remain undisbursed at the end of the fiscal year will carry over as PDIF reserve funds in the subsequent fiscal year. Applications for **Fee Waiver Requests** may be approved by the SLRD’s Project and Program Coordinator up to the amount allocated for this purpose. Funds for fee waivers approved in this manner will be transferred directly from the SLRD to the Village of Pemberton upon receipt of acceptable supporting documents from Village of Pemberton staff in the year for which the funding relates.

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Approved funding will be disbursed by the SLRD at the earliest available opportunity, which is anticipated to be in August of each calendar year. Funds will be disbursed no later than August 30. If an organization that has been approved for funding requires its funding earlier in the calendar year, it must advise of this need at time of application or submit a formal written request for early disbursement to the SLRD and the SLRD will attempt to meet such request.

The following allocation policy applies to the respective application types:

- **One-Time Funding** will be provided for those programs, projects or events that do not require a commitment of funds over a long term. The maximum contribution for **One-Time Funding** is \$5,000.
- **Seed-Funding** will be provided through agreements established for a three-year period. Under this form of agreement annual funding will be set as follows:
 - Year One: Full application amount (maximum \$15,000, which may not exceed 50% of a program’s total budget);
 - Year Two: Two Thirds (2/3) of year one;
 - Year Three: Two Thirds (2/3) of year two.

Seed-Funding applications will be given preference over **Long-Term Agreement Funding** applications by the SLRD/PVUS Committee.

- **Long-Term Agreement Funding** will be provided for a three-year term with up to two (2) one (1) year renewals for a maximum term of five (5) years. Under this form of Agreement, funding in each year will remain the same as established at the outset of the funding term with a maximum annual disbursement of \$12,000, which should not exceed 50% of a program’s total budget.
- **Fee Waiver Funding** will be provided for programs, projects or events requesting fee waivers or reduction in rental fees as per the Existing Squamish-Lillooet Regional District Pemberton and District Recreation Service Fees and Charges . The maximum potential contribution for **Fee Waiver Requests** is \$1,500 per organization, per year.

Application and Reporting Process & Criteria

The following process shall apply to One-Time Funding, Seed Funding and Long-Term Agreement Funding PDIF funding applications:	
<ul style="list-style-type: none"> • Funding applications must include the following documents: <ol style="list-style-type: none"> 1. Completed application form (attached to this Policy as Schedule ‘A’) 2. Project outline and timeline. If funds are being requested for a specific employment position, a detailed employment description must be provided. 3. Project budget, which includes: 	

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- a. Detailed cost estimates;
 - b. Sources of confirmed revenue;
 - c. Sources of revenue yet to be confirmed (i.e. other grant applications still pending decision);
 - d. Sources of confirmed donations for labour and/or materials; and
 - e. Most recent set of financial statements, if applicable.
4. Society documentation, if applicable; and
 5. Letters of support from other organizations or groups supporting the project.
- Applicants requesting PDIF funds in excess of \$5, 000 must attend a PVUS Committee meeting following the submission of their application to provide a maximum 5-minute presentation on their proposed project, which must include summary information of the following:
 1. Project budget
 2. Program/project/event information and objectives
 3. Deliverables both short-term and, if applicable, long-term
 4. Demonstration of how the SLRD and Village will be acknowledged for their support (see recognition section below for more detail).
 - Applications for funding amounts equal to or less than \$5, 000 do not require a presentation to the PVUS Committee, but do require a completed application form to be submitted along with all supporting documentation.
 - All organizations or entities planning to make application to the PDIF are encouraged to arrange to meet with SLRD staff well in advance of the request being submitted.
 - All organizations or entities that are approved for funding through the PDIF program will be required to enter into a funding agreement with the SLRD and provide proof of insurance before any funds are disbursed.

The following criteria shall apply to only **One-Time Funding** PDIF funding programs:

Application Criteria

- Applications can be submitted at any point in the year, but must be made at least 45-days in advance of the program, activity or event subject to the application, or as far in advance as possible.
- Funding requests can be made online and submitted electronically.

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- Funding requests are not to exceed \$5,000.
- Applicants for **One-Time Funding** requests must consider the need for future or ongoing funds prior to submitting an application, as **One-Time Funding** cannot be reapplied for the same use in subsequent years. If a recipient of **One-Time Funding** in excess of \$1,500 wishes to request funds in subsequent years for the same use, in the second year the applicant must apply for **Long-Term Agreement Funding** and the first year of **One-Time Funding** will be included in the total term of the long-term agreement if the applicant is successful in securing additional funds.
- Receipt of funds in any given fiscal year does not guarantee that PDIF funds will be provided to applicants for the same or different uses in any other fiscal year.
- SLRD Staff will disclose information pertaining to the remaining balance of PDIF **One-Time Funding** for any given year that an application is made, and the applicant and SLRD staff may work together to modify the funding request as may be required.

Reporting Criteria

- Applicants must submit a copy of the PDIF Reporting Form (Schedule B) to SLRD staff / the PVUS Committee within 90 days of completing the one-time activity, event, project or program, which must include:
 1. A financial summary of the activity, event or program including how the grant funds and other sources of revenue were used compared to the proposed budget submitted with the application
 2. The primary accomplishments of the project/event
 3. The impacts the grant funds had on the organization and community.
- If **One-Time Funding** is to facilitate activities over the course of a single year an applicant must notify the SLRD when the project/activity is completed, and submit the reporting form.
- Failure to provide or meet any of the required reporting criteria will disqualify any future funding requests by the applicant.
- The SLRD may terminate or withhold any outstanding payments due for non-performance at any time if it is deemed by the PVUS Committee, SLRD Board or Village Council that the funds are not being utilized as intended in a funding agreement.

The following criteria shall apply to only **Fee Waiver Funding**:

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Application Criteria

- Applications can be submitted at any point in the year, but it is preferred that they be made as far in advance as possible.
- Organizations will be required to meet all requirements of the venue for which they are requesting the **Fee Waiver Funding** which may include entering into rental agreements, providing proof of insurance and supplying permits as outlined in the Existing [Squamish-Lillooet Regional District Pemberton and District Recreation Service Fees and Charges Bylaw](#) to be confirmed by staff responsible for the venue.
- Organizations or entities must review their **Fee Waiver Request** with SLRD and Village staff well in advance of the request being submitted to confirm venue availability and requirements.
- Funding requests can be made online and submitted electronically.
- Funding requests are not to exceed \$1, 500 per organization per year.
- Funding requests are not to exceed one year in length.
- Applicants for **Fee Waiver Funding** requests must consider the need for future or ongoing funds prior to submitting an application. Repeat requests for the same purpose may be directed to submit an application for **Long-Term** or **Seed Funding**.
- Receipt of funds in any given fiscal year does not guarantee that PDIF funds will be provided to applicants for the same or different uses in any other fiscal year.
- Staff will disclose information pertaining to the remaining balance of PDIF **Fee-Waiver Funding** for any given year that an application is made, and the applicant and staff may work together to modify the funding request as may be required.

Reporting Criteria

- There are no reporting requirements for fee waivers.
- Fee waiver approval may be withdrawn at any time by the SLRD's Project and Program Coordinator.

The following criteria shall apply to only **Seed Funding** and **Long-Term Agreement Funding** PDIF funding applications:

Application Criteria

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- Funding requests must be submitted in writing using the prescribed application form (Schedule 'A') **by 4:00 PM of October 15th** of any given year in order to be eligible for consideration in the following year's budget allocation.
- Funding applications received after the October 15 deadline will not be eligible for consideration in the following year's budget.
- Applicants must attend the a PVUS Committee meeting (anticipated to be in December or January) to make a presentation for both new funding requests, and extensions to funding terms (the requirement to present for an extension to a funding term may be waived by SLRD staff).
- All **Long-Term Agreement Funding** will be provided under a maximum of 5-year agreements. 5-year agreements will generally be structured using one 3-year term followed by two 1-year renewal periods. Agreements shorter than 5-years will utilize custom terms and renewal periods, as applicable.
- **Seed Funding** agreements will only be provided once and cannot be reapplied for at the end of the 3-year term and cannot be transitioned to **Long-Term Agreement Funding**.
- At the end of a **Long-Term Agreement Funding** term, the organization may reapply for a new long-term agreement. Previous receipt of funds does not guarantee that PDIF funds will be provided to applicants for the same or different uses in any other fiscal year.

Reporting Criteria

- Progress and/or Final Reports are required every year an organization receives funding. Reports must be completed using PDIF Reporting Form Schedule 'B', and must be submitted electronically no later than 4:00 pm on November 15.
- Progress and/or Final Reports must include:
 1. An annual financial summary of the activity, event or program including how the grant funds and other sources of revenue were used compared to the proposed budget submitted with the application.
 2. The primary accomplishments of the organization for the preceding year.
 3. The impacts the grant funds had on the organization and community.
 4. The proposed workplan and use of the funds for the subsequent year. Workplans for subsequent funding years should include updated information from what was included with the original funding application (i.e. annual project outline, updated annual budget, renewed society information, as applicable).
- Recipients receiving \$12, 000 or below per year do not require a progress report presentation be made to the PVUS Committee.

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- All recipients must attend a PVUS Committee meeting at the end of their funding term to present their final report.
- Failure to provide or meet any of the required reporting criteria will disqualify any future funding requests by the applicant.
- The SLRD may terminate or withhold any outstanding or future payments due for non-performance at any time if it is deemed by the PVUS Committee, SLRD Board or Village Council that the funds are not being utilized as intended in a funding agreement.

Recognition

SLRD Electoral Area C and the Village shall be acknowledged as a sponsor of all of the organization’s programs, activities, or events. PDIF funding recipients are required to:

- Recognize their funding publicly through photo opportunities, social media, news releases and any events held by the organization;
- Acknowledge the funding in media releases, media interviews, annual reports, newsletters, social media activities, videos and promotional materials, both online and in print;
- Use the SLRD and Village logo and name according to guidelines and communications provided to the recipients;
- Report on all recognition activities and media coverage in the organization’s Progress or Final Report;
- SLRD Electoral Area C and the Village shall be acknowledged as a sponsor and/or proponent of all the organization’s programs, activities, or events in all published materials and advertising.

Under extenuating circumstances, PVUS and/or the SLRD shall have the discretion to waive any of the terms within this policy.

Minor amendments to this policy can be approved by the SLRD’s Chief Administrative Officer.

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Pemberton and District Initiative Fund Application Form

The Squamish-Lillooet Regional District (SLRD) Pemberton and District Initiative Fund (PDIF) is a fund established by the SLRD and the Village of Pemberton which is dedicated to the financial support of registered non-profit organizations whose activities will provide benefit to the residents of the Village of Pemberton and SLRD Electoral Area C. Support from the Regional District and Village is provided in the form of financial assistance only (i.e. cash contributions).

Financial support from local government is not provided to commercial (for-profit) businesses, retroactive funding for project expenses incurred prior to funding approval, debt retirement, reserves or mortgage pay downs, large scale capital and public infrastructure projects (*with approved exceptions*), ongoing fundamental operations of league or club-based sports programs, prize money, or to organizations already receiving annual recurring funding through other local government financial services.

Financial assistance provided through PDIF may be used for wages, honorariums, contract services, promotions and marketing purposes, special events, projects and/or activities, and strategic or business plan development. Funding may also be used for the purpose of acquiring furnishings, equipment and supplies. Further information on eligible and ineligible program expenses is provided in the PDIF policy (SLRD Board Policy No. 2.16 – Pemberton and District Initiative Fund Policy).

Please complete this application form and submit along with any additional information that may be of assistance to the SLRD no later than 4:00 pm on October 15 (**Seed Funding and Long-Term Agreement Funding**), or 45 days prior to your event (**One-Time Funding, Fee Waiver Requests**). Applications must not be handwritten and should not exceed 10 pages. **Incomplete applications will not be accepted.**

After reviewing applications for completeness, staff will contact applicants with the next step in the process which may include a presentation to the Pemberton Valley Utilities & Services Committee.

Please note: Applications selected to go to the PVUS Committee are not guarantee funding approval. Applicants will be kept informed of the status of their application. If approved by PVUS and/or the SLRD Board to receive funding, recipients are required to sign an agreement, provide evidence of appropriate insurance and fulfill the reporting requirements as outlined in the policy prior to disbursement of funds.

Application packages may be submitted by e-mail, mail or fax. Alternatively, applications can be submitted online through the PDIF web-page at www.slrd.bc.ca using the digital application form provided.

Organization Information

Application Date: _____

Community Organization Name: _____

Registered Tax Charity # or Society Registration #: _____

Year Established: _____

Primary Contact Name: _____

Primary Contact Phone #: _____

Primary/Organization Mailing Address: _____

Primary Contact Email Address: _____

Primary Contact Fax #: _____

Organization Website: _____

Annual Report / Bylaws filed with the Provincial Government? Yes No

If Yes, date last filed: _____

Society Executive Contacts (do not include primary)			
Title	Name	Email	Phone

Organization Status (check all that apply). Attach evidence of charitable status if applicable

Special Interest Society Not-for-Profit Community Group Charity Other

Organization Mission Statement (if applicable)

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Details of Funding Request

1. Please identify the funding stream and the type of funding being requested. Provide a brief description of the proposed timeline (e.g. one-time event, one-time project over 1 year, 3-year seed, 3+ year long-term, etc.)

Arts, Culture and Recreation stream

OR

Economic Development stream

One-Time Funding: _____

Seed Funding: _____

Long-Term Agreement Funding: _____

Fee Waiver Funding: _____

2.a. Annual (or One-Time) Financial Assistance Requested: \$ _____

2.b. Total Financial Assistance Requested
(sum of all years, Seeding Funding reduced by 2/3 each year): \$ _____

2.c. Total Program Budget: \$ _____

2.d. Total external fundraising obtained as of application date: \$ _____

(Please also attach a detailed budget including: Detailed cost estimates, Sources of confirmed revenue, Sources of revenue yet to be confirmed, Sources of confirmed donations for labour and/or materials, and the most recent set of financial statements, if applicable.)

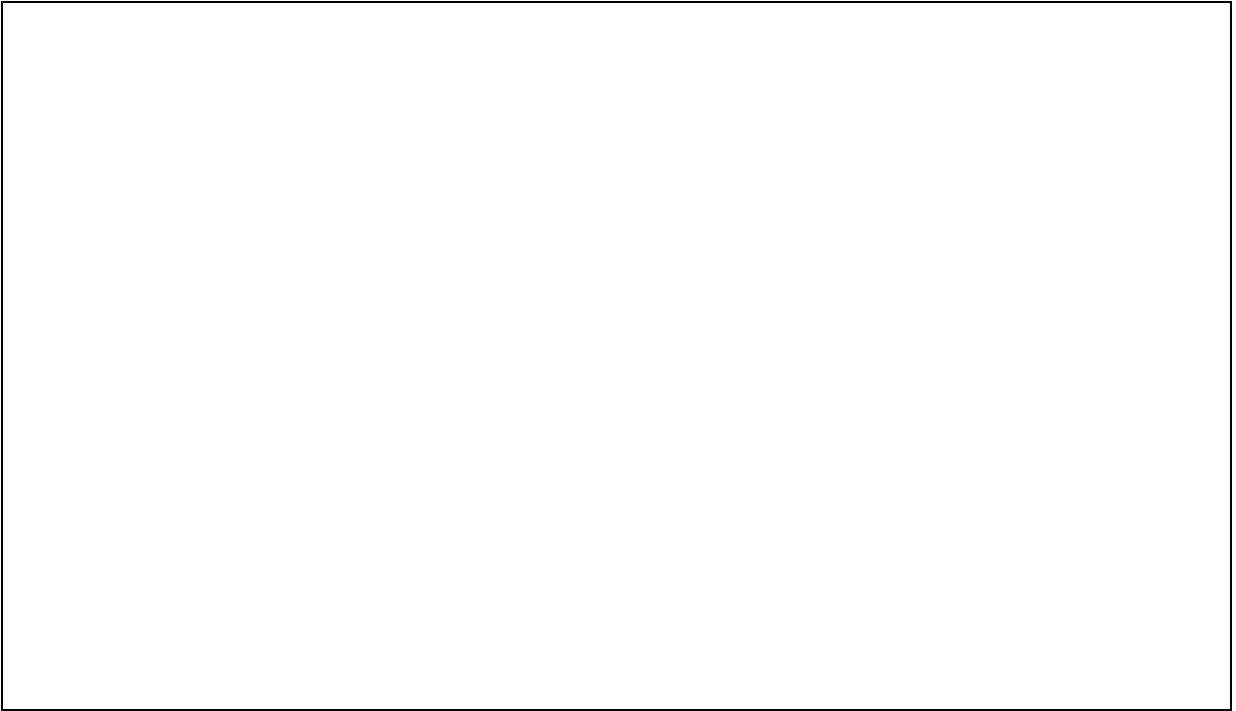
Please complete the following sections in the spaces provided. Applicants may attach additional information on separate pages only if absolutely necessary.

3. Name of program and items or activities needing support.

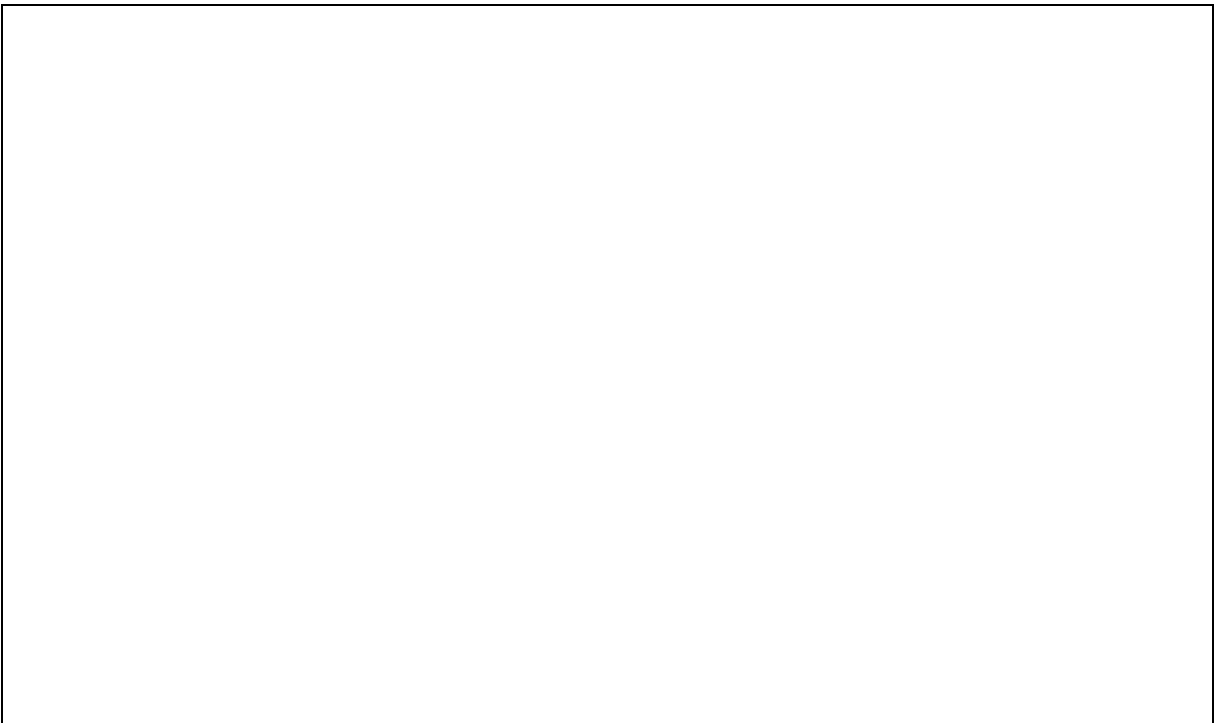
4. Provide a description of the program, and identify how it will benefit, strengthen and enhance the well-being of the residents of the Village of Pemberton and SLRD Electoral Area C.

5. Describe the amount of revenues requested and/or received from all other sources, how these are used to support the primary program under application, and how PDIF funds may be used to leverage additional sources of revenue (please provide updates as results become available).

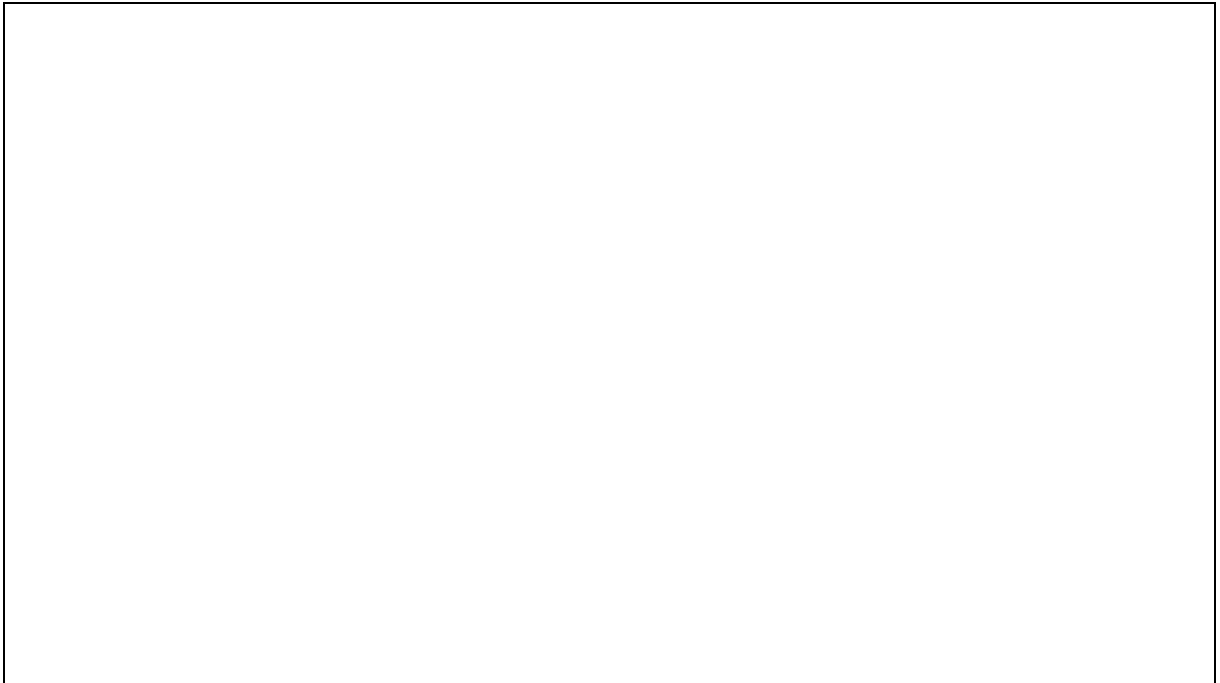
6. Explain why the organization was established and its key goals.



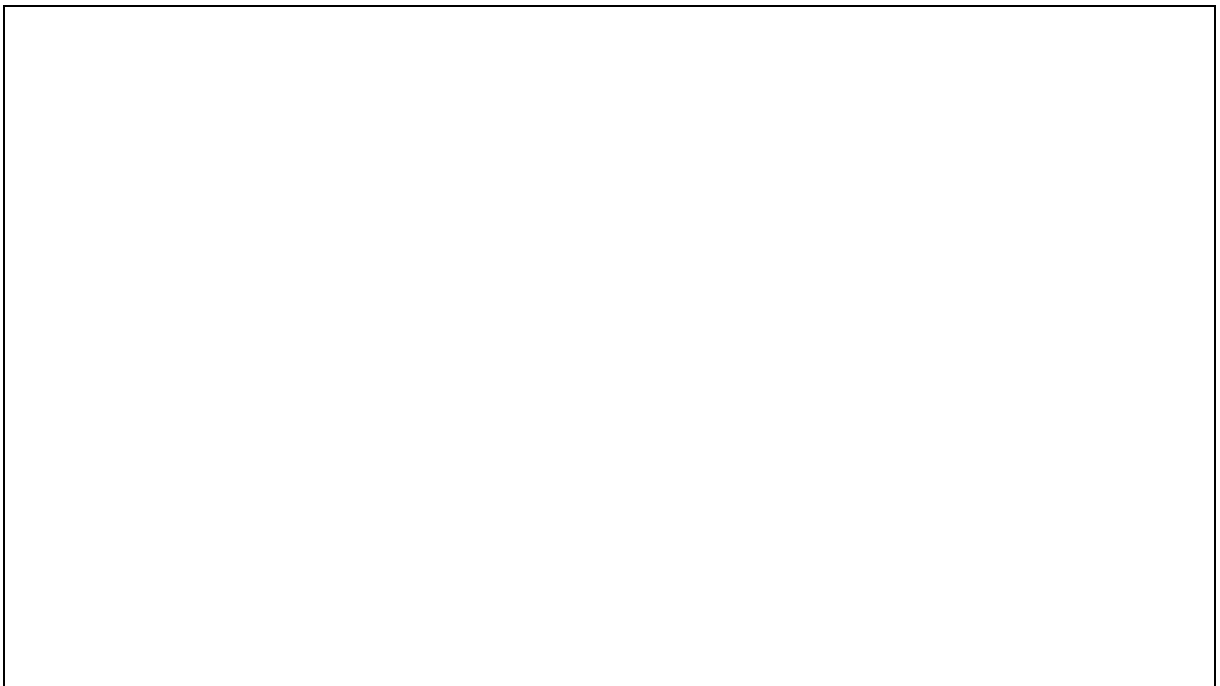
7. Describe the organization's administrative structure, including how funds are managed.



8. Describe how many persons and the geographic area the organization serves, and how many people within the community are expected to benefit from the specific program under application.



9. Explain the consequences of not receiving funds through PDIF and what other options would be pursued.



10. Explain whether the organization has received funding from either the SLRD or Village of Pemberton in the past. If so, provide details of what it was for and for what amount.

11. Explain how the SLRD and Village of Pemberton would be given recognition for the PDIF contribution, if provided.

12. Any other information in support of the application.

13. Indicate the Start Date and End Date of the program, as applicable. Also indicate when the funding disbursement is required. (*Note, the SLRD will disburse funds in August based on its receipt of funding through property taxes unless there are extraordinary circumstances)

Anticipated Start Date	
Anticipated End Date	
Preferred Month for Funding Disbursement	

Application Checklist (Please check each box and append the corresponding document to the application package)	
Requirement	✓
Detailed Project Budget Including: <ul style="list-style-type: none"> • Detailed Cost Estimates • Sources of Confirmed Revenue • Sources of Unconfirmed Revenue • Sources of Donations • Any other Sources of Revenue 	
Most Recent Financial Statements (as applicable)	
Society Documentation (e.g. current registration, bylaws, etc.)	
Letters of Support (as applicable)	
Completed and Signed Application Form (as applicable)	
Agree to attend PVUS Meeting to Present In-Person (as applicable)	
Agree to Provide Project Update and Final Reporting Requirements	

Signature / Date

Signature of Applicant

Date



Pemberton and District Initiative Fund Reporting Form

Organization Information

Report Date: _____
Community Organization Name: _____
Primary Contact Name: _____
Primary Contact Phone #: _____
Primary/Organization Mailing Address: _____
Primary Contact Email Address: _____
Primary Contact Fax #: _____

Reporting Information

Funding Type and Amount (Check One)

- One-Time Funding* (Amount) \$ _____
- Seed Funding* (Year One Amount) \$ _____ (Total Amount) \$ _____
- Long-Term Agreement Funding* (Annual Amount) \$ _____ (Total Amount) \$ _____

Report Type (Check All That Apply)

- Annual Progress Report (*Seed Funding or Long-Term Agreement Funding*)
 - Year 1 Year 2 Year 3 Year 4 Year 5 Other
- Final Report (*Seed Funding and Long-Term Agreement Funding*)
- Final Report (*One-Time Funding*)

Report Narrative (Complete All Sections)

1. Program/Project Description. Briefly recount the project or program your organization provided with Pemberton and District Initiative Fund (PDIF) grant funds.

2. Describe the primary accomplishments of your project or program, and how these align with the objectives you described in your funding proposal for this period? What evidence do you have to demonstrate your success? If you did not achieve your intended results, why?

3. Describe how many Village of Pemberton and Electoral Area "C" residents were served by your project or program in the reporting period, how many non-residents may have been served, and how the project or program impacted the well-being of the populations or groups that were served.

4. If your organization intends for this project or program to be sustained or repeated after the grant period has ended, what actions have your organization and project partners taken and what actions will be taken to facilitate sustainability?

5. Provide a financial summary of the activity, event or program including how the grant funds and other sources of revenue were used compared to the proposed budget submitted with the application (use the space provided below, or attach as a separate page).

6. Describe what activities have been carried out to recognize the SLRD's and Village of Pemberton's PDIF funding contribution.

Please complete the following section only if you are submitting a progress report for Seed-Funding or Long-Term Agreement Funding.

7. Describe your organization's proposed workplan and use of the funds for the subsequent year. Workplans for subsequent funding years should include the updated information as was included with the original funding application (i.e. annual project outline, updated annual budget, renewed society information, as applicable—use the space below or attach additional pages as may be necessary).

Seed Funding and Long-Term Agreement Funding PDIF grant reports must be submitted to the SLRD by 4:00 pm, November 15th.

One-Time Funding PDIF grant reports must be submitted to the SLRD within 90 days of the completion of the funded project, program or event.