

Recognition and Support Policy for Non-Profit Organizations

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I. Definitions and acronyms

1. NPO: non-profit organization
2. Borough: Pierrefonds-Roxboro Borough
3. BC: Pierrefonds-Roxboro Borough Council
4. BD: Pierrefonds-Roxboro Borough Director
5. DCSLDS: Direction de la culture, sport, loisirs et développement social

II. General considerations

The Borough fulfils its mission by meeting its residents' needs in terms of culture, sports, recreation and social development. It does so by offering services mainly in the areas of:

1. regular seasonal or annual programs
2. special events
3. development projects
4. support in the form of financial and material assistance and various services

Nonetheless, in carrying out its activities, the Borough must take account of a number of defining characteristics:

- Its geography in terms of the shape and size of its territory (very long and narrow), but also its location in the northwest part of Montréal Island. The Borough is divided into three sectors:
 - east,
 - centre,
 - west;
- Its growing population and the different make-up of each sector;
- The history of the different communities, in the east, centre and west sectors, including the integration of the former town of Roxboro;
- Its bilingual status;
- The status of the social and economic fabrics specific to each of its communities;
- The presence of a strong community spirit based on traditions, but that must evolve as it adapts to new social and generational realities.

In this context, relations between the Borough and NPOs must also evolve. This process depends on enhanced communications and working more closely with NPOs and the realities facing them in carrying out their missions.

Consequently, this policy is a valuable tool for improving communications and operations. To make sure that the tool is flexible and adaptable, most of the procedures, processes and criteria to be used in determining recognition and support are listed in the appendices, so that they can be updated periodically as necessary.

III. Application

This policy applies to NPOs working in the Borough to offer goods and services to its residents. It also applies to everyone working for the political and administrative bodies in the Borough, in accordance with current legislation and by-laws.

IV. Values and principles

1. Values

This policy is in line with the values of the Borough: equity, equality, respect, engagement, integrity and tolerance, along with support for families and communities.

2. General principles

a) Meeting the needs of Borough residents

The Borough must ensure that the services offered clearly meet and evolve with residents' needs. To track this evolution, the Borough must partner with the NPOs working on its territory to develop new services, integrating facilities and equipment as necessary.

Accordingly, these services also include the principle of universal accessibility, take account of diversity and respect for traditions and allow individuals and communities to grow and flourish. Lastly, they encourage exchanges, joint action, collaboration and development and foster people's sense of belonging to the Borough.

b) Universality

The NPO's mission must be carried out with no discrimination of any kind and without regard for clients' religion, origins and ethnicity, in accordance with the applicable legislation and by-laws.

c) The portion of the mission devoted to development

The Borough will give preference to NPOs whose mission, or part of their mission, contributes to Borough residents' personal development, i.e. their welfare, wellbeing, quality of life, safety and education.

d) Complementarity among NPOs

An organization's mission must represent a unique offer of goods and services and must not duplicate the mission of one or more NPOs already serving a given territory and clientele.

e) Encouraging and promoting volunteerism

The Borough values volunteerism by individuals and communities. It also encourages, promotes and supports groups of associations that lead to synergy and better coverage of volunteer efforts in its different sectors.

f) Formalizing and managing partnerships

The Borough uses different contractual tools to formalize its partnerships with NPOs, specifying delivery conditions, the parties' roles and responsibilities and its reporting requirements for each partner NPO.

The Borough manages its partnerships in accordance with the rules contained in this policy, but also in keeping with the specifics of the different NPOs and the milieux in which they work. These specifics are reflected in the contractual documents.

g) Financial autonomy

The Borough encourages NPOs to be financially autonomous. Depending on the type of partnership, the Borough provides NPOs with all the necessary advisory and material support to help them achieve and/or maintain financial autonomy.

h) Sustainable development

The Borough gives preference to NPOs that comply with the Borough's local sustainable development plan and apply it in their service delivery.

i) Universal accessibility

The Borough gives preference to NPOs that subscribe to universal accessibility principles and standards and apply them in their service delivery.

V. Policy objectives

The above considerations determine the general aims of this policy, which are as follows:

1. Identify the Borough's principles and aims in terms of recognizing and supporting NPOs;
2. Specify the roles and responsibilities of individuals involved in NPOs working in the Borough in the areas of culture, sports, recreation and social development;
3. Identify criteria for eligibility, level of recognition and level of support for NPOs;
4. Determine and formalize decision-making, monitoring and evaluation processes for NPOs;
5. Define the operating rules to be followed by the Borough and recognized NPOs;
6. Identify and explain the management tools associated with this policy.

VI. Areas of activity

The DCSLDS is active in the following areas:

Culture: Support for cultural organizations involved in the creation, dissemination and conservation of art, language and techniques; visual arts, performing arts, heritage, history, museology, applied arts, literature and media arts.

Sports: Support for sports organizations offering physical activities that call on people's physical and technical skills and abilities. These activities require specific equipment and facilities, and take the form of organized competitions following recognized rules, and may or may not be governed by a federation.

Recreation: Support for community recreational organizations offering leisure activities for entertainment, relaxation and pleasure.

Social development, i.e. support for:

- community social development organizations allowing residents to participate actively in society by improving their living conditions and aiming to develop the potential of individuals and the community as a whole;
- mandatory organizations offering important services for residents; may be mandated to offer programming or develop activities in a specific area.

Groups of organizations: Support for these legal entities, consisting of organizations recognized by the Borough in the above areas of activity of the DCSLDS, for purposes of collaboration, synergy, co-ordinated action, pooling of resources and allocating volunteer efforts for better delivery of services to residents.

Regional organizations: Support for any sports or recreation organization whose scope of action extends beyond the Borough, in compliance with the federated rules governing the discipline.

VII. Roles and responsibilities

1. Borough Council

a) Policy

Encourage residents and NPOs to understand and comply with this policy.

b) Recognition of organizations

In keeping with recommendations from the Borough's administrative units, and in accordance with this policy, decide on the recognition status of NPOs and, if applicable, the support they should be granted.

c) Requests for recognition and support

Inform requesting NPOs that they must submit their applications through the channels outlined in the decision-making process in this policy.

d) Contracts awarded to NPOs

If contracts are awarded by agreement or through a duly conducted call for tenders process, the analysis of recognition status may be one of the criteria used in evaluating the tenders. However, it may not in itself be a criterion for rejecting a tender.

e) Mayor's discretion

In exceptional circumstances, the Mayor may at his or her discretion decide on the support to be granted to an NPO.

2. Borough administration**f) Policy**

Encourage Borough Council members and Borough employees, residents and NPOs to understand and comply with this policy.

g) Requests for recognition and support

Inform requesting NPOs that they must submit their applications through the channels outlined in the decision-making process in this policy.

3. DCSLDS

1. Provide advisory support for NPOs in the different areas of activity;
2. Maintain optimal communications and information links between NPOs, the borough's administrative units, "corporate" units and decision-making instances;
3. Ensure equitable and appropriate promotion of the services offered by NPOs recognized by the Borough;
4. Facilitate timely access to functional facilities meeting high quality standards;
5. Keep an up-to-date inventory of organizations working on its territory;
6. Evaluate requests from NPOs, their operation, respect for their missions and agreements with the Borough. Decide on follow-up and/or make appropriate recommendations to decision-making authorities.

4. Non-profit organizations (NPOs)

1. Offer Borough residents services that meet their needs and are consistent with the Borough's orientations and priorities;
2. Provide the Borough with all necessary information to obtain and maintain their recognition, in accordance with the conditions in Appendix 1;
3. Behave in an ethical, respectful, honest and upstanding manner at all times;
4. Provide all the information required when requesting support, as stipulated in Appendix 1;
5. Use the Borough's financial support fully and only for the purposes for which it was granted;
6. Promptly inform the Borough of any situation that could interfere with their delivery of services to residents.

VIII. Recognition of NPOs

1. Criteria

To be recognized by the Borough and, where applicable, obtain the support resulting from this status, NPOs must meet the following minimal criteria:

1. Have a corporate status complying with the applicable legislation and by-laws;
2. Operate in the Borough;
3. Offer Borough residents services that meet their needs and are consistent with the Borough's orientations and priorities;
4. Have a reputation for honesty and integrity, not tainted by any violation of legislation and by-laws, and showing ongoing respect for Borough residents and employees;
5. Complement the other organizations and services offered by the Borough;
6. Show rigorous and appropriate management of its human, financial and material resources.

Other criteria specific to the category of activities (Appendix 2) are also used to determine an NPO's suitability for recognition and support.

2. Request

NPOs wishing to be recognized by the Borough must submit a written request to the DCSLDS, as outlined in Appendix 1.

3. Confirmation

NPOs that are recognized by the Borough will receive written confirmation in the form of an official letter issued by the Borough, accompanied by a resolution of the Borough Council.

4. Annual review of recognition status

NPOs' recognition status is reviewed annually by the Borough, as outlined in Appendix 1.

5. Classification of NPOs

The Borough classifies NPOs into the following categories; this classification is reviewed annually as outlined in Appendix 1:

- Category A: Organizations that have top priority for support from the Borough, since they meet all the different recognition and support criteria;
- Category B: Organizations that have less priority, since they only meet only some of the different recognition and support criteria;
- Category C: Organizations that have the least priority, since they meet few and/or indirectly the different recognition and support criteria.

The calculation grids used for granting financial support and the criteria for studying requests for equipment loans take these categories into account.

IX. Support for NPOs

1. Prerequisites

To obtain support from the Borough, the organization must be recognized by the Borough.

2. Type of support

The Borough essentially offers the following types of support:

1. Financial support: through financial subsidies or preferential rates (Appendix 3);
2. Material support: through access to facilities, equipment and certain supplies (Appendix 4). Material support is entirely subject to the Borough **policy on facility and equipment loans and rentals**;
3. Support for labour: through the supply of labour, essentially but not only for transportation and handling (Appendix 4);
4. Support for communications and marketing: through the option of publishing press releases, articles and advertisements in magazines, newspapers and on electronic billboards (Appendix 4);

5. Advisory support: consulting with NPOs on their management, structures and funding, and other advisory services as necessary (Appendix 4).

Appendix 1: Decision-Making Process

(For the recognition and support of NPOs)

1.1 Recognition of organizations

- Step 1: The request must be submitted using the official form for this purpose, available on the Borough website and at municipal buildings, in particular Borough Hall and the two Borough libraries.
- Step 2: Send the completed request, with the supporting documents listed below, to (adresse courriel générique) or to (adresse de l'Arrondissement)
1. Official proof of incorporation
 2. Audited financial statements
 3. Organization chart and list of the members of the Board of Directors
 4. Mission, orientations and objectives
 5. Long- and short-term plans, clearly stating how the NPO intends to fulfil its mission
 6. If the request for recognition is accompanied by a request for support, the latter must include at least an official letter from the NPO specifying the type and level of support sought. This letter must be ratified by the representative(s) authorized by a resolution of the NPO's Board of Directors.
- Step 3: The request will be studied by the DCSLDS; the NPO will be evaluated, scored and classified. The DCSLDS will make a recommendation to the Borough Council.
- Step 4: The Borough Council will decide whether or not to recognize the organization.
- Step 5: The official reply will be sent to the NPO, with the appropriate explanations in the event of a refusal.
- Step 6: Recognized NPOs will be added to the list of NPOs recognized by the Borough. This list is available on the Borough website.

1.2 Support and commitment

Recognized NPOs may request support from the Borough in the categories listed in point IX-2 of this policy, using the official form for this purpose available on the Borough website or from the DCSLDS.

For all support by the Borough, a contract must be ratified by the NPO, agreeing to comply with the Borough's conditions and requirements in return for the support received.

1.3 Maintenance and renewal of recognition status

In accordance with point VIII-4 of this policy, the Borough annually reviews the recognition granted to NPOs. In particular, it examines:

1. Compliance with the criteria in this policy;
2. Compliance with the conditions and requirements in contract documents.

For purposes of this annual review, interviews may be conducted and the organization may be asked to produce official documents.

If the Borough decides to withdraw its recognition of an NPO, the organization will be notified in writing within **10 working days** of the Borough's decision.

1.4 Loss of recognition status

An NPO that loses its recognition status loses it for an entire year, effective as of the end of the year in which its recognition status was reviewed. It may submit a new request to the Borough at the end of that year.

Appendix 2: Recognition Requirements and Criteria

(For studying requests for recognition)

1. Requirements, i.e. the documents to be provided:

- 1.1. Official proof of incorporation: letters patent, charter and associated by-laws
- 1.2. Audited financial statements
- 1.3. Organization chart and list of members of the Board of Directors
- 1.4. Mission, orientations and objectives
- 1.5. Long- and short-term plans, clearly stating how the NPO intends to fulfil its mission
- 1.6. Official letter to the Director of the DCSLDS, signed by the NPO's president, officially requesting recognition by the Borough
- 1.7. Attestation signed by the president, treasurer and another Board member, attesting to the accuracy and completeness of the information provided

2. Criteria:

2.1. Location of the NPO's head office:

Organizations with their head office in the Borough will be given preference.

2.2. Residence of the NPO's Board members:

NPOs whose Board members live in the Borough will be given preference.

2.3. Percentage of participants from the Borough:

NPOs with the highest percentage of Borough residents involved in their activities will be given preference.

2.4. Territory:

NPOs whose territory corresponds mainly to the territory of the Borough will be given preference.

2.5. Mission and activities:

The NPO's mission and activities must correspond to the areas of activity described in section VI of this policy. In addition, they must be in line with the Borough's orientations and priorities.

2.6. Respect for City and Borough policies:

To be recognized, NPOs must comply with City and Borough policies.

2.7. Complementarity and non-competition:

NPOs whose activities complement those of other NPOs will be given preference.

2.8. Rigorous management:

NPOs managed in a rigorous fashion will be given preference.

2.9. Reputation:

NPOs whose reputation is not tainted by any disrespect for or violation of legislation and rules, and that show ongoing concern for meeting their commitments, safety and security in general, customer service, and collaboration with the Borough and the community in general will be given preference.

2.10. Organization:

The organization's statutes and by-laws, its organization and management are based on recognized best practices in its area.

Appendix 3: Main Criteria for Obtaining Financial Support

1. The NPO is recognized by the Borough.
2. The NPO's area of activity and recognition category.
3. The NPO's mission must be in line with the Borough's priority orientations. The periodic review of Borough priorities may lead to a review of financial assistance granted.
4. The achievement of objectives such as the level of client services as defined in the annual action plan submitted by the NPO to the Borough.
5. The production of financial reports by the organization, which must exercise control over its revenues and expenditures and submit annual financial reports to the Borough.
6. The planning and organization of quality activity programs and the communication and promotion of these programs.
7. Overall management of the agreement with the Borough. This also includes the proper and controlled use of donations and subsidies in keeping with the purposes for which they were awarded.
8. The quality of supervision of participants and the level of client service, supported by adequate management of the NPO's staff.
9. Participation by Borough residents in the NPO's activities, as a percentage of total participation. This ratio may also be interpreted as the number of Borough residents served by the NPO in comparison with the total number of people served.
10. The quality of relations with the NPO's partners.

Appendix 4: Criteria for Support Types 2, 3, 4 and 5

1. Be recognized by the Borough.
2. Carry out activities in the Borough.
3. Deliver services and/or activities in line with the Borough's priorities and orientations.
4. The events and activities organized by NPOs must not be intended to make a profit and must not involve any social and/or racial discrimination.
5. The events and activities organized by NPOs may not be intended to finance or promote religious values or ideologies, a political party and/or its program and/or its members.
6. NPOs must respect all conditions of the annual memorandum of agreement signed with the Borough.
7. For promotion purposes, NPOs must provide complete and accurate information on their activities.

Appendix 5: Analysis Tools for Recognition and Support

1. Application form and analysis grid for recognition of NPOs (Excel file: 82.06 Reconnaissance.xlt)
2. Analysis grid for financial support of sports and recreation organizations (Excel file: 82.06 Analyse-Soutien.xlt)

Transitional measures (to be submitted as a summary report with the GDD for the adoption of the policy)

For purposes of implementing the policy on the recognition and support of NPOs, the Pierrefonds-Roxboro Borough is implementing the following transitional measures:

1. All NPOs currently working with the Borough will be reviewed for recognition, as soon as this policy is adopted, without having to apply for recognition.
2. NPOs recognized following the decision-making process described in the policy on the recognition and support of NPOs will receive official written confirmation of their recognition from the Borough.
3. NPOs not recognized following this review will receive official written notification from the Borough, explaining the points and situations to be corrected. Following this initial decision by the Borough, they will have until December 31, 2015 to make the necessary adjustments and corrections in order to be granted recognition. The Borough will continue to support these NPOs during this period.
4. The previous paragraph notwithstanding, if the recognition review shows major irregularities or problems so serious that they cannot be corrected or adjusted, the decision of non-recognition may be applied immediately and irrevocably.
5. NPOs that have taken advantage of this adjustment period will have to submit a request for recognition at the end of the period. If the NPO is not granted recognition after this application is reviewed, it will not receive any support from the Borough in 2016. It may re-apply for recognition at the end of 2016.