

# Willow Lake Métis Nation

## Community Investment & Member Support Funding Policy

### Responsible Person

The Willow Lake Metis Nation Board of Directors are responsible for management of this policy, and for responding to questions posed regarding this policy.

### Purpose / Rational

The purpose of this policy is to achieve two key outcomes:

- 1) To establish Willow Lake Metis Community Investment program for organizations needing assistance to develop programing within our region.
- 2) To invest in Willow Lake Métis Nation Members for advancement of the Metis community.

### Definition (for purposes of this Policy)

Members – Métis who are registered in the Willow Lake Métis Nation Data Base. Children Membership is authorized by their parent until the age of 18.

Award – Financial amount paid through the Community Investment Fund

Committee –a group consisting of the Willow Lake Metis Leadership who are responsible for the management of this fund.

### Policy

The Willow Lake Metis Nation Community Investment Fund (the “Fund”) has been established to provide financial assistance to organizations for the advancement of the Metis community and to support regional programing.

The Fund shall be funded by community investment funding, board fundraising and charitable donations provided by members and any entities or individuals who want to assist.

This policy is subject to amendment from time to time as determined by the Board.

## GENERAL PROVISIONS

### Eligibility criteria for applying for Community Investment funding

To be eligible to receive an award from the Fund,

The fund award must support at least one Willow Lake Métis Nation Member.

- The organization must operate within the RMWB

- The organization should be a registered charity which is eligible to issue official tax receipts for donations, or an established not-for-profit community organization.
- The organization must be in good standing with Alberta Registries.
- The Investment must provide opportunity for public recognition of the Willow Lake Métis Nation.
- Fund applications must be submitted a minimum 30 days in advance of funding requirements.

### **Limitations and exclusions**

Except in special circumstances as determined by Willow Lake Metis, community investment donations will not be made in support of the following:

- Individuals;
- Religious organizations;
- Third-party fundraisers;
- Travel for individuals or groups;
- Political organizations;
- For-profit organizations regardless of its mandate, function or service;

### **Eligibility criteria for applying for Member support funding**

To be eligible to receive an award from the Fund,

The fund award must support at least one Willow Lake Métis Nation Member.

- Applying Member must provide sponsorship details on:
  - What event, organization, or program it will support
  - How the money will be utilized to benefit the Member
  - What (if any) advertising is available in support of the Willow Lake Métis Nation.
- Fund applications must be submitted a minimum 30 days in advance of funding requirements.

### **Limitations and exclusions**

Except in special circumstances as determined by Willow Lake Metis, the Award will not be made in support of the following: (Not limited to)

- Religious organizations
- Third-party fundraisers
- Political organizations
- For-profit organizations regardless of its mandate, function, or service

### **Recipient Regulations**

- All awards are subject to the availability of funds and extent of need. Because the Fund is supported by the Willow Lake Metis Association's annual budget, there is no guarantee that there will be available funds throughout the year as the fund is drawn down.
- Application will be reviewed, assessed, and determined based on fund availability.
- Community Investment assistance will be limited to one donation per organization per year.
- After a member receives notification of an award, the member must wait 6 months before applying for additional assistance.

- The member may not resubmit an application that was previously denied.
- If funds are not available a Member application can be put on hold until such time that funds become available to support.

### **Fund Review Committee**

The Willow Lake Metis Leadership will be responsible for the implementation of this fund. The Committee shall meet monthly. Awards will be approved by a majority vote of the committee. At the discretion of the Committee they can determine if a request is deemed an emergency and review the request immediately. Any member of the Committee who has a conflict of interest due to immediate family, personal or business Nations shall refrain from discussing or voting on such matters.

### **Administration**

The Committee's records will be retained in the Willow Lake Metis office. Generally, documentation will include:

- A complete description for the donation provided.
- Costs associated with providing the assistance, if any.
- The name, address, and amount distributed to each recipient.
- Any conflict of interest between a recipient and Committee members.

## **Related Procedures**

### **DONATING TO THE FUND**

- Any person or entity is eligible to donate to the Fund.
- The fund will be administered by the Willow Lake Metis Leadership.
- Community Investment donations cannot be earmarked for specific individuals.

### **APPLYING TO THE FUND**

- Applications and Letters of request must be completed and submitted to the Willow Lake Metis Office no later than 30 days in advance of funding requirements. All decisions made by the Committee will be based solely on the information submitted with the application.
- Approval of applications is subject to availability of funds, extent of need, and satisfactory completion of the application.
- The Committee may request additional information or documentation from an applicant before making a decision. Such requests will be communicated by the Willow Lake Metis Leadership. The applicant will be given two weeks to provide the requested information or to explain why it cannot

be provided. If the applicant does not respond to the request, the application will be deemed withdrawn.

- An appointed member of the Committee will communicate the decision to the applicant.
- Payments will be made directly to the applicant upon receipts, or to the requesting organization.
- All decisions by the Fund Review Committee are final. No appeals process is available.

# Willow Lake Métis Nation

## Community Investment Application

Name of Organization: \_\_\_\_\_

Name of Contact: \_\_\_\_\_ Phone number: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

Registration Number: \_\_\_\_\_ Date of request: \_\_\_\_\_

Reason of Request: \_\_\_\_\_

Total Cost of Project: \$ \_\_\_\_\_ Requested Amount: \$ \_\_\_\_\_

Did you apply for other funding sources: YES or NO

If Yes list all funding sources and their amounts:

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If NO note why your organization didn't pursue other funding sources:

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Describe the following:

- How does this project benefit the Willow Lake Métis Nation.
- Describe your organization's relationship with Willow Lake Métis Nation.
- Describe how Willow Lake Métis Nation will be publicly recognized for their donation.

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Describe your Project:

Upon submitting your Community Investment Application, in a separate document in as much detail you must include a description of your project / event.

**Willow Lake Métis Nation**  
Member Supporting Fund Application

Name of Organization: \_\_\_\_\_

Name of Contact: \_\_\_\_\_ Phone number: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

Registration Number: \_\_\_\_\_ Date of request: \_\_\_\_\_

Reason of Request: \_\_\_\_\_

Total Cost of Project:     \$ \_\_\_\_\_ Requested Amount:     \$ \_\_\_\_\_

Did you apply for other funding sources:                      YES                      or                      NO

If Yes list all funding sources and their amounts:

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If NO note why your organization didn't pursue other funding sources:

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Describe the following:

- How does this project benefit the Willow Lake Métis Nation.
- Describe your organization's relationship with Willow Lake Métis Nation.
- Describe how Willow Lake Métis Nation will be publicly recognized for their donation.

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Describe your Project:

Upon submitting your Community Investment Application, in a separate document in as much detail you must include a description of your project / event.