

Attachment # 3

*Letter of Agreement (LOA) and Payment
Processing for Volunteer Coordination &
Supports*



**Multi-Year Letter of Agreement (LOA) for Volunteer Coordination & Supports
2026-28**

Application: Volunteer C&S 2026-28 2026-01-23 : A-05410

THIS AGREEMENT is effective as of 2026-04-01, (the “**Effective Date**”)

BETWEEN:

United Way British Columbia, a registered charity operating in the Lower Mainland, Fraser Valley, Southern Interior, Thompson-Nicola-Cariboo, Central and Northern Vancouver Island, Southern Vancouver Island, and Northern BC regions of British Columbia, and having its head office at 4543 Canada Way, Burnaby, British Columbia
("UWBC")

AND:

Grant Recipient Information:

Provide the following information:

Organisation Name (Grantee):City of New Westminster

Executive Director (or designate):Erica Mark

Executive Director Email Address:emark@newwestcity.ca

Website:newwestcity.ca

Address:511 Royal Ave

City:New Westminster

Province:BC

Postal Code:V3L 1H9

Non-Profit

Indigenous Governing Body

Is this organisation a Qualified Donee:

Charitable Reg. No. (if applicable).

BC Society No.:

First Nation No.:

Other Identifier Description: Registered municipality

(the "**Grantee**" and, together with UWBC, the "**Parties**")



CONTEXT:

- A. The Grantee is a "grantee organization" within the context of this agreement.
- B. The Grantee is seeking financial support for the initiative described in [Schedule A](#) to this Agreement (the "**Program**");
- C. UWBC wishes to support the Grantee in delivering the initiative by making a grant to the Grantee; and
- D. Terms not otherwise defined in the main body of this Agreement are defined in [Schedule D](#).

THEREFORE, in consideration of the mutual premises contained in this Letter of Agreement (collectively with all schedules, the "**Agreement**") and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties agree as follows:

Section I – UWBC Commitments

Grant Funds

1. Subject to the terms and conditions of this Agreement, UWBC will deliver a total of \$75,000.00 in Fiscal Year 2026-27 (April 1, 2026 to March 31, 2027) ('Year 1'), with an opportunity to receive incremental funding of \$75,000.00 in Fiscal Year 2027–28 (April 1, 2027 to March 31, 2028) (the "**Grant Funds**"), according to the funding distribution schedule set out in Schedule B (the "**Distribution Schedule**").
2. Where the Distribution Schedule contemplates payment of Grant Funds over more than one fiscal year, UWBC's obligation to deliver any portion of the Grant Funds in a subsequent fiscal year is conditional upon (a) UWBC having access to and the availability of funds to do so, and (b) the Agency's compliance with Year 1 reporting, financial accountability, performance, and any corrective actions identified by UWBC, as set out in the UWBC Escalation Process.

Adjustments

3. UWBC's obligation to deliver the Grant Funds according to the Distribution Schedule is subject to UWBC having access to funds to do so. If UWBC does not have access to funds, UWBC may decide to reduce the amount of Grant Funds and/or revise the Distribution Schedule.



4. If UWBC decides to reduce the amount of Grant Funds and/or revise the Distribution Schedule, UWBC will deliver written notice of the reduction and/or revision to the Grantee as soon as practicable after its decision.
5. As soon as practicable after receiving the written notice of the reduction of Grant Funds and/or revision to the Distribution Schedule from UWBC, the Grantee will deliver to UWBC a written proposal setting out how it plans to allocate the funds in light of such reduction and/or revision, as applicable (the "**Adjustment Proposal**").
6. If UWBC approves the Adjustment Proposal, UWBC will notify the Grantee in writing of its approval and will deliver the Grant Funds as reduced and/or as set out in the revised Distribution Schedule, as applicable. If UWBC does not approve the Adjustment Proposal, acting reasonably, UWBC will notify the Grantee in writing that it has not been approved and the Grantee may prepare and deliver an amended Adjustment Proposal for UWBC's consideration within [30] days of such notification.
7. If UWBC approves the amended Adjustment Proposal, UWBC will notify the Grantee in writing of its approval and will deliver the Grant Funds as reduced and/or as set out in the revised Distribution Schedule, as applicable. If UWBC does not approve the amended Adjustment Proposal, acting reasonably, UWBC will notify the Grantee in writing that it has not been approved.
8. Any Adjustment Proposal or amended Adjustment Proposal approved by UWBC will form part of this Agreement.

Section II – Promotion and Recognition

By UWBC

9. The Grantee authorizes UWBC to disclose its relationship with the Grantee in its advertising, promotions, and communications to inform the public of the services offered by the Grantee and to use the name and marks of the Organization.
10. UWBC agrees (within a reasonable time frame) to use reasonable commercial efforts to withdraw or have withdrawn any disclosure made pursuant to paragraph 8 and to cease distributing or broadcasting any public message or printed material involving the use of the Organization's names and marks which in the view of the Organization, acting reasonably, could cause damage to the reputation of the Organization.
11. In furtherance of the Organization's obligations listed below, UWBC will provide to the Grantee the appropriate graphic elements and branding guidelines, including UWBC logo(s) and any other required links.



By the Organization

12. The Grantee agrees to recognize and promote its relationship with UWBC and participating government partners including the financial support provided UWBC to the Grantee on all advertising and communications pertaining to the areas benefitting from UWBC's funding support. Specifically, the Grantee agrees to include UWBC's name and marks in its publicity and communications material including but not limited to brochures, newsletters, website content, social media, videos, press releases, presentations, media interviews, and all other written, audiovisual, and public communications (<https://uwbc.ca/media/#toolkit>) See Schedule A-Required Engagement Activities including joint United Way BC/government funding partnerships for more details if applicable.
13. The Grantee agrees to offer UWBC the opportunity to be part of presentations, community events and speaking engagements organized by the Organization and to recognize UWBC at these presentations, events, and engagements.
14. The Grantee agrees to participate in donor engagement activities yearly as applicable by providing speakers for UWBC workplace campaigns and events, hosting donor engagement opportunities and working with UWBC's Marketing and Communications team to develop a video, story, social media post for distribution on UWBC channels.
15. The Grantee agrees to place the UWBC logo and other UWBC recognition materials provided to the Grantee by UWBC in a highly visible location within the Grantee (i.e., program site, agency reception, or other high traffic area) and to place the UWBC logo on the Organization's website with a hyperlink to www.uwbc.ca.
16. The Grantee agrees to use reasonable efforts to follow UWBC's social media accounts and to provide to UWBC the Organization's social media account details.
17. The Grantee agrees to submit to UWBC available success stories and impact statements by clients for use by UWBC in its discretion.
18. The Grantee agrees to withdraw or have withdrawn from circulation and cease distribution of broadcasting (in a reasonable time frame) of any public message or printed material involving the use of UWBC's name or marks which in the view of UWBC, acting reasonably, could cause damages to UWBC.

Section III - Grantee Commitments

Grant Funds

19. The Grantee will only use any Grant Funds to fund the Program in accordance with [Schedule A](#) of this Agreement.



20. The Grantee will return any unused Grant Funds by 11:59 PM on the End Date set out in the Distribution Schedule, or, if applicable, the revised Distribution Schedule.

Monitoring and Reporting

21. The Grantee will comply with the monitoring and reporting requirements set out in [Schedule C](#) to this Agreement (the "**Monitoring and Reporting Requirements**").

Compliance with Laws

22. The Grantee will at all times comply with all applicable laws.

Confidential Information

23. The Grantee will not disclose, use or allow unauthorized access to any Confidential Information related to UWBC that it has acquired in connection with this Agreement without UWBC's prior written consent.

Non-Compliance

24. If UWBC believes the Grantee is not in compliance with this Agreement, UWBC may deliver written notice of the Grantee's non-compliance (the "**Notice of Non-Compliance**") to the Grantee:

- (a) identifying the relevant provisions of this Agreement with which the Grantee is not complying; and
- (b) describing the corrective action the Grantee must take in order to help address its non-compliance and the timelines to do so.

25. If the Grantee receives a Notice of Non-Compliance, the Grantee must take the corrective action within the timelines described in the notice and confirm in writing to UWBC that it has done so (the "**Confirmation of Compliance**").

Section IV – Compliance and Termination

26. Either Party may terminate this Agreement for any reason by providing the other Party with 90 days' written notice.

27. UWBC may immediately suspend delivery of all or any part of the Grant Funds and/or terminate this Agreement, without notice to the Grantee if:

- (a) UWBC does not receive an amended Adjustment Proposal within **[30]** days of providing the Grantee notice that the Adjustment Proposal was not approved;



- (b) UWBC does not approve an amended Adjustment Proposal;
- (c) the Grantee does not comply with any of its obligations under this Agreement;
- (d) the Grantee receives any notice of or takes any acts or proceedings, or if any act or proceeding is taken against the Grantee, in connection with any liquidation, winding-up, dissolution, bankruptcy, receivership, reorganization or termination of operations of the Grantee;
- (e) UWBC believes that any actions taken by or on behalf of the Grantee have placed the health and safety of any person involved in delivering the Program, or any beneficiary of the Program, at risk;
- (f) if UWBC does not receive the Confirmation of Compliance from the Grantee within the timelines described in the Notice of Non-Compliance;
or
- (g) if UWBC receives a Confirmation of Compliance and determines on a reasonable basis that the Grantee is still not in compliance as identified in the Notice of Non-Compliance.

28. If this Agreement is terminated for any reason, the Grantee will promptly, and in any event within **30** business days after termination:

- (a) provide UWBC with an accounting of the portion of the Grant Funds that were spent as at the date of termination;
- (b) return any unspent portion of the Grant Funds to UWBC; including without limitation any pre-purchased near cash vouchers and any capital equipment (such as laptops) acquired with the Grant Funds, unless otherwise agreed in writing by UWBC
- (c) inform all persons involved in delivering the Program and all beneficiaries of the Program that UWBC is no longer contributing to or associated with the Program.

29. If this Agreement is terminated for any reason, upon request by UWBC, the Grantee will arrange for an authorized representative of the Grantee to meet with a representative of UWBC to discuss and settle any outstanding issues under this Agreement at a mutually convenient time not more than **30** days following the date of termination.

30. If this Agreement is terminated for any reason, the Monitoring and Reporting Requirements, Clauses 22, 30, and 31 and any other provisions of this Agreement that, by their nature, are intended to survive the termination of this Agreement, will survive termination.

Section V – Indemnification and Limitation of Liability



31. The Grantee agrees to indemnify and save harmless UWBC from and against all liabilities, claims and demands whatsoever arising at any time in connection with this Agreement or the Program.
32. The Grantee acknowledges that UWBC and its affiliates and their respective officers, directors, agents, servants, employees and volunteers will not be liable for any loss or damages resulting, directly or indirectly, from any action or decision of the Grantee, its affiliates, or their respective officers, directors, agents, servants, employees and volunteers, unless UWBC gave prior written consent to such decision or action.

Section VI – General

33. Each Party agrees that it will execute or deliver such further documents and do such further acts and things as another Party may reasonably request in order to carry out this Agreement.
34. All notices, proposals, and other communication from one Party to the other under this Agreement must be in writing and delivered to the address of the recipient Party set out above, or to such other address as may be specified by such Party to the other.
35. This Agreement may only be amended by an agreement between the Parties in writing. The rights and obligations under this Agreement may not be assigned or transferred by a Party without the prior written consent of the other Party.
36. This Agreement will be construed in accordance with the laws of British Columbia and the federal laws of Canada applicable therein.
37. This Agreement constitutes the entire agreement between the Parties with respect to the subject matter of this Agreement and supersedes any prior understandings or agreements of the Parties with respect to the subject matter of this Agreement. Any provision of this Agreement which is, or becomes, illegal, invalid, or unenforceable will be severed here from and be ineffective to the extent of such illegality, invalidity, or unenforceability, but shall not affect or impair the remaining provisions hereof.
38. Time is of the essence of this Agreement. This Agreement will not be construed as creating a partnership, joint venture, franchise, agency, or other similar relationship between the Parties. Neither Party will have the right, power, or authority to bind the other Party in any way without the other Party's prior written consent.
39. The headings in this Agreement have been inserted for convenience or reference only, and are in no way intended to describe, interpret, define, affect the construction of or limit the scope, extent or intent of this Agreement or any provision in this Agreement. This Agreement may be executed by electronic transmission and in counterparts and all executed and delivered counterparts will be deemed to be an



original and together will constitute one and the same Agreement and regardless of the date of execution, will be deemed to have been executed on the Effective Date.

Grantees maintain such insurance as is reasonably necessary to perform its obligations under this Agreement, including commercial general liability and, where applicable, third-party liability insurance relating to the delivery of programs and services funded under this Agreement. Where required by UWBC, Grantees will add UWBC as an additional insured on such policies. Grantee will provide evidence of such coverage to UWBC upon reasonable request and will promptly notify UWBC of any material change or cancellation



The Grantee hereby agrees to the terms and conditions of this Agreement as of the stated Effective Date, which may be earlier or later than the date it is signed by both Parties (the “Execution Date”) as outlined in Schedule D

Name of Signatory: Dean Gibson

Signature:

Date(MM/DD/YY):

Title of Signatory (Board President/Chair, Chief or Designate): Director of Parks and Recreation

Name of Grantee: City of New Westminster

Address of Grantee:

511 Royal Ave, New Westminster, BC, V3L 1H9

Name of Signatory: Donnie Rosa

Signature:

Date(MM/DD/YY):

Title of Signatory (CEO, Executive Director, Senior Administrator or Designate): Chief Administrative Officer

Name of Grantee: City of New Westminster

Address of Grantee:

511 Royal Ave, New Westminster, BC, V3L 1H9

UWBC Name of Signatory: Kim Winchell

Signature:

Date(MM/DD/YY):

Title of Signatory: Chief Program & Impact Officer

United Way British Columbia
4543 Canada Way
Burnaby, British Columbia
V5G 4T4



Schedule A – Program/Initiative Description

General Description

*Description of Initiative/ Program. Include **who** the activity will benefit (i.e., who are the "charitable beneficiaries") and **how** (i.e., what "public benefit" will the beneficiaries receive as a result of the activity taking place).*

This grant will be utilized to continue to sustain the staff position created to coordinate and support volunteers for the Century House Association, the City of New Westminster, and the Seniors Services Society. This individual will oversee the recruitment, training, support, recognition, and retention of volunteers across all three organizations. While each organization will handle its own on-site support and organization-specific orientation, the Volunteer Coordinator will provide general training, identify volunteer opportunities within each organization, and match volunteers to appropriate roles. The Coordinator will engage with the senior population to recruit volunteers and recommend suitable placements. Additionally, they will be responsible for organizing workshops and educational sessions on volunteering, leadership, and available opportunities. The Coordinator will maintain regular communication with the partners and volunteers to ensure needs are met. They will coordinate and implement volunteer recognition events and activities to express appreciation and promote volunteer retention

Initiative / Program Goals

Key deliverables of the Initiative/Program:

2 large volunteer appreciation events annually - host a minimum of 12 volunteer appreciation activities/opportunities learning annually - provide a minimum of 40 unique volunteer opportunities - host 12 volunteer orientations annually

Required Engagement Activities

Specific engagement and attendance requirements set by the grantor. This can include meetings, use of platforms, or marketing supports etc.:

Please refer to the 2026-28 Learning & Evaluation Plan as attached.

Location

Describe the location(s) where the initiative or program will take place (this can be addresses or communities):

Century House - 620 8th St, New Westminster, BC V3M 3S6 Queensborough
Community Centre - 920 Ewen Ave, New Westminster, BC V3M 5C8 tēmәsewtxw
Aquatic and Community Centre - 65 E Sixth Ave, New Westminster, BC V3L 4G6,,We predominantly service the City of New Westminster; however, we have participants from all over the lower mainland particularly Burnaby, Surrey, Coquitlam, Port Coquitlam and



Vancouver. We recognize and respect that New Westminister is on the unceded and unsurrendered land of the Halkomelem speaking peoples.,,,,,,New Westminister.

Duration

Provide the anticipated start date and end date for the Initiative/Program. If the start date and/or end date may be affected by any particular factor(s) or circumstance(s), describe said factor(s) or circumstance(s) in the "notes" section below:

StartDate(DD/MM/YY):2026-04-01EndDate(DD/MM/YY):2028-03-31

Notes:

See application for funding breakdown.



Schedule B – Distribution Schedule

Term

UWBC will deliver the Grant Funds to the Grantee as follows:

Single Installment Multiple Installments

<u>Distribution Schedule</u>				
<i>Upon payment of the final installment, the total amount in the “Amount of Installment” column should be equal to the total amount of the Grant Funds.</i>				
Installment No.	Payable (MM/YY)	Amount of Installment	Grant Stream	GL-Details (internal use)
D-02899	2026-04-24	\$37,500.00	Volunteer Coordination & Supports 2026-28	D2157-EXP0064-W205-HA02
D-02900	2026-10-30	\$37,500.00	Volunteer Coordination & Supports 2026-28	D2157-EXP0064-W205-HA02
D-02901	2027-04-30	\$37,500.00	Volunteer Coordination & Supports 2026-28	D2157-EXP0064-W205-HA02
D-02902	2027-10-29	\$37,500.00	Volunteer Coordination & Supports 2026-28	D2157-EXP0064-W205-HA02

Fiscal Year	Total Fiscal Year Amount
2026-27	\$75,000.00
2027-28	\$75,000.00
Total:	\$150,000.00

Schedule C – Monitoring and Reporting Requirements

Tracking Funds

40. The Grantee shall maintain separate and accurate records relating to the Grant Funds. These records must contain sufficient detail to allow both the Grantee and UWBC to determine how the Grant Funds have been used and the amount expended at any given time. UWBC may review or audit these records at its request.
41. The Grantee shall not allow the Grant Funds or any portion thereof to be used as, or to confer, a Private Benefit.

Reporting Requirements

42. UWBC shall provide the Grantee with report templates (the “**Report Templates**”), and the Grantee shall complete the Report Templates and submit them to UWBC in accordance with the following schedule:

1. **Type:** Report, **Description:** NA,
Deliverable: 2026-07-31,
Information to be Included: Volunteer Coordination & Supports Q1 Outcome Report 2026-2027
2. **Type:** Report, **Description:** NA,
Deliverable: 2026-10-30,
Information to be Included: Volunteer Coordination & Supports Q2 Outcome Report 2026-2027
3. **Type:** Report, **Description:** NA,
Deliverable: 2027-01-29,
Information to be Included: Volunteer Coordination & Supports Q3 Outcome Report 2026-2027
4. **Type:** Report, **Description:** NA,

Deliverable: 2027-05-07,

Information to be Included: Volunteer Coordination & Supports Annual Outcome Report 2026-2027

5. **Type:** Report, **Description:** NA,

Deliverable: 2027-07-30,

Information to be Included: Volunteer Coordination & Supports Q1 Outcome Report 2027-2028

6. **Type:** Report, **Description:** NA,

Deliverable: 2027-10-29,

Information to be Included: Volunteer Coordination & Supports Q2 Outcome Report 2027-2028

7. **Type:** Report, **Description:** NA,

Deliverable: 2028-01-31,

Information to be Included: Volunteer Coordination & Supports Q3 Outcome Report 2027-2028

8. **Type:** Report, **Description:** NA,

Deliverable: 2028-05-05,

Information to be Included: Volunteer Coordination & Supports Annual Outcome Report 2027-2028

** The “deliverable” date for each interim report should precede the “payable” date for the next installment of the Grant Funds as set out in the Distribution Schedule so that if the Grantee fails to deliver the interim report, or the interim report is not satisfactory, UWBC has time to take appropriate steps (e.g., by suspending delivery of the next installment of the Grant Funds to the Grantee).*



43. In addition, the Grantee shall immediately notify UWBC in writing of any change in circumstances that impacts, or may impact, the intent and purpose of this Agreement, UWBC's ability to comply with its obligations under the *Income Tax Act* (ITA) or the relationship between UWBC and the Grantee, including, but not limited to:

- (a) any change in circumstances that results in, or may result in, the Grantee no longer being a "qualified donee" or a "grantee organization" within the meaning of subsection 149.1(1) of the ITA;
- (b) any change in circumstances that results in, or may result in, the Program or UWBC's support thereof no longer being consistent with or in furtherance of UWBC's charitable purposes;
- (c) any instance of the Grant Funds or a portion thereof being used as, or to confer, a Private Benefit and, more generally, any instance of a Private Benefit being conferred in connection with or in the course of delivering the Program whether or not the Grant Funds contributed to the Private Benefit;
- (d) any change in the involvement of Related Persons or Third Parties in the delivery of the Program, including, but not limited to, the involvement of new Related Persons or Third Parties, or any change in the nature or extent of the involvement of Related Persons or Third Parties;
- (e) any change in circumstances that results in, or may result in, the Grantee being unable to comply with the Monitoring and Reporting Requirements;
- (f) any change in the social, political or financial stability of the area where the Program is being delivered;
- (g) any change in circumstances that affects, or may affect, the Grantee's or UWBC's reputation; and
- (h) the dissolution of the Grantee or any other change in circumstances that results in, or may result in, the Grantee no longer having capacity to deliver the Program, or the suspension or cancellation of the Program.

Monitoring

44. UWBC may request that the Grantee do any of the following, and the Grantee shall comply with such request as soon as reasonably practicable:

- (a) provide UWBC with information about the Grantee including, but not limited to, information related to the Grantee's finances, property, organizational structure, employees, volunteers and programs and

services, and information related to any Related Persons or Third Parties directly or indirectly associated with the Grantee;

- (b) provide UWBC with audit reports, financial statements and bank records of the Grantee for a certain period;
- (c) provide UWBC with invoices and receipts issued to the Grantee for a certain period;
- (d) provide UWBC with records of the Grantee's communications by letter, telephone, videoconference and/or email for a certain period;
- (e) provide UWBC with certain photographs or video in the possession of the Grantee;
- (f) permit UWBC staff to visit any of the Grantee's premises and/or the location where the Program is being delivered.
- (g) Provide UWBC, where required by UWBC's funders, contractual obligations, or applicable law, with de-identified or personal participant data related to the Program. This will follow timelines, templates, and rationale provided by UWBC, and comply with all applicable privacy laws. UWBC's commitment: UWBC will only request personal data when reasonably necessary for funder, contractual, or legal needs, preferring de-identified or aggregated data where possible. UWBC will not require more information than needed and expects Grantees to handle it per privacy laws and UWBC's Privacy Policy.

Schedule D – Definitions

In this Agreement:

The term **Related Persons** has the meaning ascribed to it in section 151 of the ITA.

The term **Third Parties** includes any person or entity (e.g., partner organization or contractor) that is or will be involved in delivering the Program, but does not fall within the definition of “Related Persons” set out in this Schedule.

The term **Grantee** is a "grantee organization" within the meaning of subsection 149.1(1) of the *Income Tax Act*, R.S.C., 1985, c. 1 (5th Supp.) ("**the ITA**");

The term **Confidential Information** includes any information that is not publicly available or well-known, could reasonably be considered private or proprietary, or could reasonably be expected to cause harm, financial or otherwise, to any person or entity if released, and, without limiting the foregoing, information identified as confidential by UWBC, whether orally or in writing.

The term **Income Tax Act** (ITA) is a statute that outlines the rules and regulations governing income tax in the country. It provides the legal framework for determining taxable income, calculating taxes payable, and administering tax collection and enforcement. The ITA contains provisions that define what constitutes taxable income, establish tax rates, and outline the rules for claiming deductions and credits. It also sets out the powers and responsibilities of the Canada Revenue Agency (CRA), which is responsible for enforcing the tax laws and collecting taxes

The term **Effective Date** for purposes of this Agreement means the date on which the Agreement is intended to take legal effect,

The term **Execution Date** means the date on which all Parties have duly signed. The legally operative date of this Agreement shall be the later of the Effective Date and the Execution Date. Unless expressly stated otherwise, no obligations arise before the Effective Date, and the Agreement is deemed legally in force only once both dates have occurred, with the later date controlling. If this Agreement is amended, and the amendment’s Effective Date occurs before its Execution Date, the original terms of the Agreement shall remain in effect until the amendment is fully executed. Any actions taken between the amendment’s Effective Date and its Execution Date that are consistent with either the original Agreement or the amended terms shall be treated as valid and accepted, unless the amendment expressly provides otherwise.

The Term **Top Up** means a single, non-recurring additional allocation of funds provided on top of existing funding to temporarily increase the total amount available for a specific purpose.

Schedule E – Carryover

2026-27

Up to 15% of funds received from United Way BC in 2026-27 may be carried over into 2027-28.

Upon submission of the 2026-27 Annual Outcome Report, including financials, funded organizations with unused amounts over 15% will be sent a revised Letter of Agreement (LOA). All changes to fund disbursement will occur in the 3rd quarter of 2027-28, ending December 31, 2027.

Agencies that have carryover amounts in excess of \$25,000 will be encouraged to spend down these funds in advance of the 2027-28 fiscal start.

2027-28

Up to 15% of funds received from United Way BC in 2027-28 may be carried over into 2028-29, up to a maximum of \$25,000.

Upon submission of the 2027-28 Annual Outcome Report, including financials, funded organizations with unused amounts over 15% or more than \$25,000 will be sent a revised Letter of Agreement (LOA). All changes to fund disbursement will occur in the 3rd quarter of 2028-29, December 31, 2028.

In the event that program funding is not renewed for 2028-2029, all unspent funds will be returned to United Way BC at the end of the 2027-2028 fiscal year.

Name of Signatory: Donnie Rosa

Signature:

Date(MM/DD/YY):

Title of Signatory (CEO, Executive Director, Senior Administrator or Designate):
Chief Administrative Officer



2026-28 United Way BC Healthy Aging Learning & Evaluation (L&E) Plan

Funded agencies and their partners play a key role in helping United Way BC Healthy Aging continuously improve our programs. Our Learning & Evaluation (L&E) activities will continue to evolve in response to what we learn from this process.

Support for, and participation in L&E, is an **expected deliverable**¹ for funded agencies. Participating in L&E activities, like training webinars, learning forums, and Communities of Practice (COPs) are valuable sources of support, inspiration, and knowledge. Expectations for agencies are described in this document, as well as resources and supports for L&E activities. Updated versions of these documents will be shared as they evolve.

What is Learning & Evaluation for United Way BC Healthy Aging Grants?

Learning & Evaluation (L&E) is described as proving need, and improving services – that is, understanding what works well and what could be improved so that we can increase the impact of programs.

In collaboration with the Healthy Aging Learning & Evaluation Advisory Committee², United Way BC has identified five key attributes that guide our work across Healthy Aging Programs:

Key Attributes for Learning & Evaluation	
<p>1. Program Standards & Progress Assessing adherence to program guidelines as well as funded agencies' interpretation of what is working well and what can be improved.</p>	<p>2. Accessibility/Availability Ensuring programming is accessible to priority populations.</p>
<p>3. Participant Satisfaction Feedback from participants regarding their satisfaction with programming offered.</p>	<p>4. Impact Measuring if, how, and to what extent the model achieves is intended outcomes.</p>

¹ United Way BC understands that from time-to-time, circumstances beyond your control may prohibit your organization's participation in L&E activities. We will work with agencies to best support extenuating circumstances.

² The Healthy Aging Learning & Evaluation Advisory Committee includes Healthy Aging Leadership Council Members and United Way BC Healthy Aging staff. As of April 1st, 2026, the Committee consists of five Leadership Council members and 4 United Way BC staff.



5. Professional and Sector Development

Supporting the CBSS sector to improve and mature through capacity building and knowledge sharing.

United Way BC will continue to adopt a ‘learning systems approach’ to learning, evaluation, and quality assurance. We aim to create a safe space in which identifying and addressing areas for improvement is not seen as a failure, but as a learning opportunity or way we can improve. Learning systems share similarities with the [Developmental Evaluation](#) approaches that are currently adopted by many organizations in the CBSS sector.

Learning, reflecting, and sharing knowledge support program development and quality improvement. United Way BC is pleased to continue to provide learning opportunities and support community engagement activities to help programs, service providers and United Way BC make services relevant and effective.

L&E activities will support funded agencies, United Way BC, and other partners to:

- Track and describe progress, results, and impacts.
- Inform planning, program development, and quality improvements.
- Reflect, learn and adapt strategies to improve program design and service delivery.
- Build the capacity of funded agencies to serve priority populations and deliver programming effectively.
- Develop knowledge and learn from each other, as well as implement Communities of Practice (COPs).
- Ensure and demonstrate accountability for use of public funding dollars.

Expectations: Learning & Evaluation Activities

All funded agencies will participate in certain learning and quality assurance activities. Tools, training, and resources enable local program staff and service providers (volunteers, contractors, etc.) to run efficient, effective programs and provide high quality services that help seniors remain independent and connected to their communities. Funded programs will participate in the following:

1. Impact Evaluation

United Way BC is required to evaluate the impact of the Healthy Aging programs through a multi-year evaluation to be completed by 2030. Evaluation findings will be shared with the Ministry of Health and will inform United Way BC’s ongoing learning



and quality assurance processes that support Healthy Aging programs. All programs are required to participate in activities that support evaluation.

Required evaluation activities may include, but are not limited to:

- Collecting and sharing participant data through intake, screening, surveys, interviews, and/or other modalities.
- Collecting and sharing agency data through surveys, interviews, site visits, gatherings, and/or other modalities.
- Completing quarterly and annual outcome reports in a timely manner, ensuring the submission of accurate, high-quality data.

Please note that if agencies are considering participating in other research or evaluation beyond what is planned for in this Agreement (outside of local program satisfaction and evaluation activities), we ask that the grantee contacts United Way BC prior to making commitments.

2. Reporting

All programs are required to submit Quarterly and Annual Outcome Reports.

Please visit your [program group in CORE BC](#) for detailed information on reporting requirements, including up-to-date reporting templates. Key reporting dates and deadlines are outlined in the table below.

Reporting and Granting Requirements	Deadline	Period
2026-27 Quarterly Report 1	July 31, 2026	April 1 – June 30, 2026
2026-27 Quarterly Report 2	October 30, 2026	July 1 – September 30, 2026
2026-27 Quarterly Report 3	January 29, 2027	October 1 – December 31, 2026
2026-27 Final Outcome Report	May 7, 2027	April 1, 2026 – March 31, 2027
2027-28 Quarterly Report 1	July 30, 2027	April 1 – June 30, 2027
2027-28 Quarterly Report 2	October 29, 2027	July 1 – September 30, 2027
2027-28 Quarterly Report 3	January 31, 2028	October 1 – December 31, 2027
2027-28 Final Outcome Report	May 5, 2028	April 1, 2027 – March 31, 2028

Data collection will be completed by funded agencies at the individual level as participants register with the program, and on an ongoing basis as participants receive services. Participant level tracking may be more detailed for some programs,



depending on the complexity and requirements of the grant.

Funded agencies will be supported to collect the above information through the creation of data collection tools which may include surveys, screening tools, focus group questions, etc.

3. Targets and Performance Benchmarks

Performance benchmarks and associated targets will serve as guidance in establishing new programs, and support long-standing programs to find efficiencies, demonstrate accountability for use of funds, and measure progress over time.

2026-28 Healthy Aging program renewal forms included pre-filled benchmarks for services individualized for each agency based on the observed efficiency of funded agencies with similar programs. These benchmarks are informed by factors including but not limited to granting stream, geographic service area (including rurality), and funding level and source to ensure that agencies set targets that are achievable and "right sized" for communities.

Over the course of the funding period, data will be monitored quarterly, and benchmarks will be updated accordingly and shared with agencies. Healthy Aging Specialists and Managers will support agencies to submit high-quality data and work towards meeting targets without compromising program quality or impact.

4. Priority Populations Screening

Programs that are required to screen (as per the Priority Populations Screening Toolkit found in your respective [grant group\(s\) in Healthy Aging CORE BC](#)) are expected to screen all new and existing participants beginning April 1st, 2026. Agencies are required to track priority population categories for each participant and report total numbers by category for both new and existing participants to United Way BC quarterly. All participants (new and existing) must be re-screened for priority populations on an annual basis.

5. Check-in(s) and Site Visits

Check-in(s) and site visits by regional Healthy Aging Specialists will occur at a minimum annually and possibly more regularly as time and capacity allows. During site visits, Healthy Aging Specialists will visit the agency, converse with staff, observe programming, and provide support as needed. Programs can request additional visits if desired. Check-ins will occur virtually, where possible.

6. Healthy Aging Summit 2026

All programs are expected to fully participate in the Healthy Aging Summit 2026. The Summit will take place in October 2026, both in person in Richmond, B.C. and



online. At least one representative from each program is required to attend, preferably in person.

7. Communities of Practice (COPs)

All programs are expected to participate in regular Community(ies) of Practice (COPs) (monthly, quarterly, etc.) in person and/or virtually. COPs are, “*groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly*” ([Wenger, et al., 2015](#)). They support and promote sharing knowledge and learning from each other, mutual problem solving, and community partnership building for participating staff and programs. COPs also offer a venue for the professional development of coordinators, and collaborative program- and sector-oriented projects.

8. Provincial and/or Regional Consultations/Gatherings

All programs are expected to participate in Provincial and/or Regional Consultations/Gatherings. Consultations/Gatherings are an important opportunity to engage in community partnership-building activities, share knowledge, and learn from one another’s successes and challenges. They are a collaborative effort involving United Way BC Healthy Aging, funded agencies, as well as diverse leaders from across the Community-Based Seniors' Services (CBSS) sector.

9. Data Collection and Outcome Reporting Training Sessions

Training sessions are available for local program staff about specific data collection and reporting, including training in quality data collection, demonstration of available tools, forms, and resources, and online reporting training (i.e., how to submit and download applications and outcome reports) by United Way BC staff, as needed.

10. Orientation Sessions

Initial and ongoing orientation sessions for local program staff (online/in person) may be provided by United Way BC staff, as needed.

11. Other United Way BC Training and Learning Opportunities

Other learning opportunities may be organized by United Way BC as the program evolves. We will listen to input/suggestions for additional training and learning opportunities from funded agencies and will revisit previously compiled interest areas to build the training/capacity development plan. These may include co-creation sessions, webinars, etc.

12. Collaboration

Collaboration is one of the Guiding Principles (see [Healthy Aging Theory of Change](#)) of Healthy Aging's Program & Service Design; and thus, all United Way BC Healthy Aging funded agencies are strongly encouraged to work in collaboration with one



another, other CBSS organizations, varying levels of government, and the health care system.

Healthy Aging Community Collaboratives ("Collaboratives") are strategic networks that work together to ensure collective activities are making a positive impact on seniors in a given community. Healthy Aging Community Collaboratives identify gaps in seniors' services and opportunities, leverage local expertise and resources for seniors in the community, and jointly determine use of grant funds. Collaboratives are comprised of various members in the community, and should include municipal representatives, Regional Districts, the Health Authority, members of the CBSS sector (including other Healthy Aging funded programs in the community), and non-United Way BC funded agencies that support older adults.

To learn more about the benefits and expectations of collaboration, please watch the recording of Healthy Aging's Program & Service Design Information Session: [\[Recording\] Information Session: 2025-26 United Way BC Healthy Aging's Program Offerings, Including Enhancement Grants on Healthy Aging CORE BC.](#)



Resources for Learning & Evaluation Activities

The following resources will support the implementation of L&E activities:

1. **Healthy Aging Framework & Theory of Change**

All Healthy Aging programs should be familiar with United Way BC's Healthy Aging Framework and Healthy Aging Theory of Change (TOC), which is a visual representation of the relationship between the work Healthy Aging programs and their partners are doing and the positive changes that are expected to result, as demonstrated by recent research and evidence. To learn more about the Healthy Aging Framework and Theory of Change, please watch this information session recording: [\[Resource\] Healthy Aging Framework and Theory of Change - Healthy Aging CORE BC](#).

2. **Priority Populations Screening Toolkit**

The Priority Populations Screening Toolkit (found in your respective [grant group\(s\) in Healthy Aging CORE BC](#)) supports funded agencies in confidently screening participants for the four Healthy Aging priority populations. It provides required screening tools, training, and resources to help agencies screen participants and track priority populations. Additional resources, including a FAQ document and information session recording, can be found on Healthy Aging CORE BC.

3. **Program Handbooks & Guides**

Program handbooks or guides have been created to support each program. It is recommended that funded agencies review these documents at regular intervals. Some programs may also have online, self-paced learning modules.

4. **Healthy Aging CORE BC**

[Healthy Aging CORE BC](#) (Collaborative Online Resources & Education) is a provincially coordinated, interactive on-line platform designed to foster communication, coordination, sector cohesion, capacity building, collective impact, and other collaborative efforts among community-based seniors' service (CBSS) agencies and stakeholders. CORE BC was developed because of extensive research and consultations aimed at addressing the lack of recognition of the value of CBSS programs in the broader community and by government, and the need to build capacity of the sector to address the growing needs of an aging population. Funded agencies are encouraged to access relevant resources and participate in training and development opportunities on CORE BC, including [closed groups](#) where relevant information is available and [discussion forums](#) are hosted

5. **Closed Groups on Healthy Aging CORE BC**



Closed and private learning groups on [Healthy Aging CORE BC](#) are used to support provincial COPs in an online format, and will enable access to relevant resources, facilitate ongoing learning, and help staff make connections. United Way BC staff monitor these groups regularly and provide support by responding to questions, posting resources etc. Agencies' participation in the group's activities will ensure relevant resources can be accessed.

6. Discussion Forums

All funded agencies are encouraged to participate in the discussion forums on [Healthy Aging CORE BC](#). Discussion forums support and promote knowledge sharing and learning and mutual problem solving. **Note:** *The grantee must be both a member of Healthy Aging CORE BC and the respective closed group(s) to access this information.*



Support from United Way BC Healthy Aging Specialists

United Way BC Healthy Aging Specialists work at regional levels and help funded agencies to increase their capacity, support program development, and facilitate connections to other organizations and resources. Healthy Aging Specialists are also available to assist with questions regarding grant applications and reporting.

For program support or questions about funded agencies' roles and responsibilities related to the L&E activities, contact your region's Healthy Aging Specialist/or Manager:

Vancouver, North Shore, Richmond, Sea to Sky & Sunshine Coast

- Manager: Dr. Beverley Pitman | beverleyp@uwbc.ca | 604.969.8331
- Specialist: Ravi Grewal | ravig@uwbc.ca | 604.268.1300

Burnaby, New Westminster, Tri-Cities, Surrey, Langley, Maple Ridge & Fraser Valley

- Manager: Elise Goertz | eliseg@uwbc.ca | 236.427.4074
- Specialist: Alison Gutrath | alisong@uwbc.ca | 778.757.3402

Vancouver Island & Gulf Islands

- Manager: Amanda Marchand | amandam@uwbc.ca | 604.708.4053

Interior BC

- Manager: Lisa Cyr | lcyr@uwbc.ca | 236.766.0508
- Specialist: Deborah Hogan | deborahh@uwbc.ca | 250.364.0999

Northern BC

- Manager: Lorelei Phillips | Loreleip@uwbc.ca | 604.708.4067
- Specialist: Sarrah Storey | sarrahs@uwbc.ca | 250.699.1681
- Specialist: Margo Piell | margop@uwbc.ca | 604.708.3205

Summary of Key Updates to United Way British Columbia's 2026/28 Letter of Agreement

We've made a few important updates to the Letter of Agreement for the 2026/27 fiscal year. Below is a clear overview of what has changed and how these updates may affect your organization. If you have any questions or concerns, please feel free to reach out to your program manager.

1. Acknowledgment of Government Funding Partners (Page 3 under Section II.11)

Grantees are required to acknowledge both United Way BC (UWBC) and participating government funding partners in any public-facing communication about funded initiatives. This includes websites, social media, brochures, press releases, and similar materials.

Public materials must follow expanded co-branding requirements to ensure proper acknowledgment. A link to [UWBC's media toolkit](#) has been added for support, and additional guidance is included in Schedule A.

2. Return of Unspent Grant Funds or Purchased Assets (Page 5 under Section IV.27.b)

If the agreement is terminated for any reason, Grantees may be required to return any pre-purchased near-cash items (e.g., gift cards, vouchers) or capital equipment (e.g., laptops) acquired by grant funding.

In addition to unspent funds, this clause now includes near-cash items and capital equipment. This will require strengthened accountability for budget tracking, documentation, and how grant dollars and assets are used.

3. Updated Insurance Requirements (Page 6 under Section V)

Organizations must maintain adequate insurance coverage, including commercial general liability and, where relevant, third-party liability for funded program activities. UWBC may request to be added as an additional insured, and proof of insurance must be provided upon request.

4. Distribution Schedule Payables Date (Page 10 under Schedule B)

The Payable Dates noted under Schedule B are subject to shift and may be adjusted to align with United Way BC's payables schedule.

5. Explicit Audit Right (Page 11 under Schedule C – 30)

Please note that this clause now contains: UWBC may review or audit these records at its request.

6. Participant Data Sharing and Privacy Standards (Page 14 under Schedule C – 43.g)

UWBC may request participant-level data, either personal or de-identified, to meet obligations to funders or comply with legal requirements. UWBC will only request what is necessary and will prefer aggregated or de-identified information whenever possible.

Grantees may need to review and update their data collection, consent forms, or privacy practices to ensure compliance.

7. Updates to Definitions in Schedule D (Page 15 under Schedule D)

We are updating Schedule D (Definitions of the Agreement) to add three new defined terms: Effective Date, Execution Date, and Top Up. These additions are intended to clarify when the Agreement and any amendments take legal effect, distinguish between the date of signing and the date obligations begin, and clearly define a one-time, non-recurring additional funding allocation.