

 THE DISTRICT OF Sooke	Policy Title: Community Service Agreement Policy	Policy No: CO-030
	Authority: Council and Chief Administrative Officer	Classification: 0340-40
	Date Adopted:	Motion No:
Historical Changes:		

Purpose:

This policy provides a consistent framework for identifying service delivery needs, forming partnerships, and formalizing community service agreements with external organizations. It ensures agreements:

- Align with Council’s strategic priorities and legislative responsibilities;
- Promote community wellbeing and equitable access; and
- Uphold fiscal accountability and responsible financial stewardship.

Scope:

This policy applies to community service agreements with third-party organizations that deliver programs or services supporting municipal objectives.

It does not apply to the procurement of goods, capital works, or construction services, which are governed by the *District’s Purchasing and Procurement Policy*.

Definitions:

For the purpose of this policy

Defined word	Definition
Community Service Agreement	A formal, time-limited agreement between the District and a third-party organization outlining terms for delivering a defined community service.
Service Need	A gap in programming, support, or infrastructure where third-party delivery could provide a public benefit consistent with municipal priorities.
Gap in Municipal Service Delivery	Occurs when local government services are insufficient, unavailable, or inaccessible to meet community needs or Council’s priorities. Examples include services that are: <ul style="list-style-type: none"> • Not offered within the local government operations at all; • Out of alignment with best practices or legislative standards and local government operations while being an identified community need; • Under-resourced (e.g., limited staffing, funding, or capacity); or • Delivered by another entity without effective local government coordination that would enhance capacity and better meet an identified community need. <p><i>Identifying such gaps helps the District determine when partnership or third-party delivery may be the most effective and equitable approach.</i></p>
Council Direction	A formal resolution of Council authorizing the identification of a service need and/or initiation of a community service agreement.
Call to Fill Services	A public or targeted invitation issued by the District to identify qualified providers to deliver a defined service.

Eligible Organizations	<p>Third-party entities that demonstrate the capacity, accountability, and alignment to deliver services on behalf of the District. Eligible organizations generally meet the following criteria:</p> <ul style="list-style-type: none"> • Legal Status: Registered non-profit, charity, cooperative, or other legally constituted entity in good standing. • Governance and Accountability: Clear governance structure; sound financial management and reporting; ability to meet insurance and risk requirements. • Capacity and Experience: Adequate human resources, expertise, and proven performance in service delivery. • Alignment with Municipal Objectives: Supports District plans, priorities, and values, including equity, accessibility, and environmental stewardship. • Local or Regional Benefit: Operates primarily within Sooke and provides demonstrable community benefit.
Delegated Authority	<p>Refers to the level of decision-making or financial approval formally assigned to the Chief Administrative Officer (CAO) or Council, acknowledging:</p> <ul style="list-style-type: none"> • The CAO has operational authority to approve and execute community service agreements within established purchasing thresholds that support operational capacity, such as executing events. • Council retains governance authority for agreements that exceed delegated limits or establish new services. • Note: All approvals must demonstrate compliance with applicable legislative, financial, and risk management requirements, including recognizing the total contract value calculated cumulatively over the full term of the agreement.

Process Overview:

5.1 Identifying a Service Need

A service need may be identified through:

- Council strategic planning and priority setting;
- Community engagement or advisory committee input;
- Gaps in municipal capacity;
- Legislative or policy mandates; or
- Funding opportunities requiring third-party delivery.

To support effective financial planning, service needs must be identified alongside the annual budget process and Council’s strategic planning.

Direct awards and competitive processes must comply with the thresholds, authorization levels, and documentation requirements of the *District’s Purchasing and Procurement Policy* and applicable trade agreements.

Unsolicited proposals will not be considered.

5.2 Call to Fill Services:

The District issues a Call to Fill Services to identify qualified third-party providers for defined service needs.

- Agreements below the applicable financial threshold may be awarded directly to a qualified provider.
- Agreements exceeding the threshold require a competitive process, such as a Call for Proposals (CFP) or Request for Expressions of Interest (REOI), which may be public or targeted depending on the scope.

Each call will include:

- Service description and expected outcomes;
- Term and budget;
- Eligibility and evaluation criteria; and
- Submission deadline and process.

Publication: Posted on the District website and/or distributed through targeted outreach.

Direct Award: May be considered only where the service is unique and no competitive providers exist, consistent with the *Purchasing and Procurement Policy*.

See Appendix: Service Need Evaluation Tool

5.3 Review and Recommendation

Submissions will be reviewed by staff using Council-approved evaluation criteria, including:

- Organizational capacity;
- Alignment with District priorities;
- Demonstrated value for money;
- Past performance (if applicable); and
- Expected community impact.

A staff report summarizing evaluation results and recommendations will be prepared for the Chief Administrative Officer or Council approval in accordance with the District's delegation of authority.

5.4 Entering into a Service Agreement

Each Service Agreement will specify:

- Defined term and renewal conditions (generally not exceeding four years)
- Service description, intended outcomes, and performance measures;
- Reporting, monitoring, and financial accountability requirements;
- Payment schedule and financial terms;
- Termination clauses and dispute resolution; and
- Insurance, liability, and indemnity requirements.

5.5 Renewing or Concluding Service Agreements

At least 90 days before expiry, staff will assess:

- Whether the service need remains;
- Provider performance and results;
- Budget availability; and
- Any shifts in strategic direction.

Based on this review, staff may recommend the following:

- Renewal (if terms allow);
- A new call to fill services; or

- Conclusion: if the need is met or priorities have changed.

Renewals or new agreements exceeding delegated authority will require Council approval. Providers will receive at least 60 days' written notice before the agreement ends, and concluding providers must submit a final report on outcomes.

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Monitoring and Evaluation:

The District will monitor agreements through:

- Regular reporting and performance reviews, as defined in agreements;
- Ongoing staff liaison and check-in meetings;
- Annual presentations by key providers to Council, typically in Q4;
- End-of-term evaluations to inform renewal or closure decisions; and
- A consolidated annual report summarizing active agreements and upcoming renewals during the budget cycle.

Policy Review:

This policy will be reviewed every five years, or earlier if directed by Council or required due to legislative or procedural changes.

References:

Policy Number:	CO-030
Policy Owner:	Office of the Chief Administrative Officer
Endorsed by:	Committee of the Whole, October 20, 2025
Final Approval:	Regular Council Meeting, October 27, 2026
Date Approved:	October 27, 2025
Review Date:	October 27, 2030
Revision Date:	n/a
Related Policies:	Purchasing Policy
Related Publications:	

Contact Information:

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Appendix: Service Need Evaluation Tool

This tool supports the District in evaluating whether a service need aligns with District priorities and warrants a call to fill services and a potential service agreement.

Criteria	Guiding Questions	Rating (1–5)	Notes/ Justification
Strategic Alignment	Does the service clearly align with the District’s Strategic Plan, Official Community Plan, or Council priorities?		
Community Impact	Will the service address a clearly identified community need or gap? Who will benefit?		
Municipal Responsibility	Is this service within the scope of local government responsibilities or a logical extension of District services?		
Equity & Inclusion	Will the service advance equity, accessibility, or inclusion in the community?		
Service Effectiveness	Can this service realistically be delivered by a third party more efficiently or effectively than by the District?		
Funding Availability	Are there secure and sustainable funding sources (e.g., budgeted allocation, grant funding)?		
Time Sensitivity	Is there an urgent or time-bound opportunity (e.g., funding window, crisis response)?		
Partnership Potential	Is there interest or capacity from known community partners to deliver the service?		

Decision Thresholds:

- Total Score \geq 32: Strong candidate for a call to fill services.
- Total Score 24–31: Requires further analysis or clarification.
- Total Score $<$ 24: Not recommended for service agreement at this time.