

<b>Policy Number</b> 46 - 2010	<b>Approval Date</b> 28 <sup>th</sup> April, 2010	<b>Resolution Number</b> 219 /10
<b>Supersedes</b> N/A	<b>Effective Date</b>	<b>Legal Authority</b>

**TITLE: Financial Support/Donation Requests**

**POLICY STATEMENT:**  
The Town of High Prairie shall ensure that ALL requests for financial support/donations are given equal opportunity and consideration.

**Purpose:** To establish a policy governing Council's consideration and Evaluation of requests for financial support/donations from the Town of High Prairie.

**Policy:** Whereas the Town of High Prairie must provide for all expenditures with in its annual budget;

**AND WHEREAS** Council deems it appropriate to establish a policy governing the approval of financial support/donations to aid groups, organizations and individuals for activities, events, and programs that are considered beneficial to the community as a whole;

**NOW THEREFORE** be it known that Council, in an open meeting assembled, establishes the following policy for consideration and evaluation of requests for financial support/donations.

**Financial Support/Donation Request Budget:**

1. Council shall set an annual financial support/donation budget as part of the provisional budget approval process undertaken each year. Once this budget has been set, Council shall not exceed it in any given year.

**Eligible Applicants:**

2. Applications for Requests for Financial Support/Donations will only be accepted and considered from non-profit and/or charitable organizations;

1. Operating inside the Municipality; or

2. Organizations considered by Council to contribute to the general interest, health, and/or welfare of the municipality in its entirety; or
3. A tourist organization or other association whose purpose is to provide residents and non residents with information about the district and its advantages as a business, educational , residential, recreational, or tourism centre, or
4. An organization or group assisting in the celebration of an event of public interest; or
5. Individuals or organizations who, having attained a recognized level of athletic, academic, or cultural excellence, are representing the district at specific events outside the municipality.

**Automatic Rejection Criteria:**

**3. Chief Financial Officer:**

The Chief Financial Officer/Town Manager has the authority to reject any application for Financial Support/Donations that would:

1. Be of sole benefit to an individual, ie and any event that would bring reward to a single person rather than a benefit to the community as a whole.
2. Has political, religious, or cause affiliation which would benefit a certain philosophy of belief, and/or support a particular philosophy of thought or belief over another.
3. Would benefit a for-profit organization, or to help defray the costs of for-profit programs and/or events.

**Financial Review Criteria and Guidelines:**

**4. General Criteria and Guidelines:**

**1. Funding Formula**

**i) Special Events:** (ie: Community festivals, sports provincials, etc)

a) if the special event for the Financial Support/Donation request is being approved benefits the entire community or is open to all citizens of the community, the support/donation must not exceed 33% (1/3) of the special event’s net cost.

b) If the special event for which the Financial Support/Donation is being approved benefits a portion of the community defined by geographic or demographic boundaries, the financial support/donation must not exceed 17% (1/6) of the special events net cost.

**ii) Financial Support/Donations for Service(s):** (ie: mandated parks, recreation, arts and culture, training etc. )

a) If the service(s) for which the financial support/donation is being approved benefits the entire community or is available to all citizens of the community, the support must not exceed 33% (1/3) of the net cost of providing the service(s)

b) If the service(s) for which the funding is being approved benefits a portion of the community defined by geographic or demographic boundaries, the support must not exceed a maximum funding of 17% (1/6) of the net cost of providing the service(s)

**Application Process**

5. Requests for Financial Support/Donations must be submitted to Council on the application form provided by the Town of High Prairie and shall include the following supporting material:

- a) A budget for the event or program that clearly shows how, if approved the funds will be utilized;
- b) An outline of the organization's or individual's goals or objectives, or the goals and objectives of the program for which the funds are requested;
- c) Applicants registered as Societies must be in good standing with the Registrar of Societies,
- d) If the applicant is an organization or society, a copy of its most recent financial statement, including in-kind support;
- e) Proof of community support (ie Letter s of Support, etc)
- f) A list of direct and indirect benefits to the community.

In addition to submitting a written request of this type, groups seeking Financial Support/Donations may also be required to present their requests orally at an open meeting of council. Presentations of this type are to be booked by Administration at a date and time acceptable to Council.

**Application Review Process:**

6. The following steps occur in the process of review after receipt:

- a) the application, including supporting material, is submitted to Administration prior to November 1<sup>st</sup> of the current year for funding in the following year.
- b) Administration will apply policy to applications, and applications meeting the requirements will be placed in their entirety in a Council Agenda Package

Dated this day: 28<sup>th</sup> day of April

\_\_\_\_\_  
Rick Dumont, Mayor

\_\_\_\_\_  
Town Manager



4. How will this proposal benefit the community by promoting enhancement of community identity and pride locally, encouragement and expansion of volunteerism, enhancement of outdoor recreation, increasing indoor recreation opportunities, promotion of healthy living, promotion of history, arts, culture, and roots, sustainability for the community (including financial stability), enhancement of quality of life for residents?

1. How will participants or beneficiaries become aware of this event/program or utilize the completed capital project?
2. What are the expected outcomes of the proposed activity?
3. List the number of citizens served by your organizations in the past two years and the number expected to be served during the 12 months following receipt of this funding if approved. Please provide any other statistics that may be helpful.
4. How will you evaluate your proposed activity at the conclusion of the project or event?
5. Identify any similar projects or events offered in the Town and describe how your proposed activity is unique.
6. List any organizations with whom you collaborate or partner in order to provide services.
7. Please indicate how your organization will recognize the Town of High Prairie's contribution to you project or event.
8. Please describe the organization's financial need for Town of High Prairie funding assistance for this proposal.
9. What are the total annual revenues for your organization?
10. Will this activity be complete within 12 months or receipt of the funds from the Town of High Prairie?
11. Will this grant be used to fund staff training and professional development? If so, please give details.
12. Please describe your organization's membership criteria, detail how many members you have, and indicate what volunteer activities the organization undertakes.

13. Outline your contingency plan if this grant application is not approved.
14. Please list any assistance your organization has received from the Town of High Prairie in the previous two four years.
15. What previous funds have you administered from sources other than the Town of High Prairie
16. Please describe the marketing and self-financing activities of your organization.
17. Where do the organizations revenues come from?
18. What are your organizations overall goals and objectives for the coming year?

All Applicants seeking assistance greater than \$1,000.00 must provide:

- a detailed report of what the funds received from the Town of High Prairie were used for in this occasion or event.
- In the event that the full amount of the assistance is not used for the purposes stated on the application or is no longer required for the project or event described, remaining funds must be returned to the Chief Financial Officer of the Town of High Prairie

**Initial to acknowledge:** \_\_\_\_\_

• The applicant will keep proper books of accounts of all receipts and expenditures relating to the project or event for which assistance is provided and will submit them at the conclusion of the initiative along with an evaluation report. The report is a full description of the implementation of the project or event. Details must be provided regarding how many individuals accessed or participated in the activity and what the benefits were to the community. The evaluation report should be received by the Town within 30 days of the conclusion of the project or event. No further requests for assistance from the organization will be accepted until such time as the report has been received and reviewed by the Town of High Prairie.

**Initial to acknowledge:** \_\_\_\_\_

• The project, program, service or event may not be represented as an activity of the Town of High Prairie and the applicant does not have authority to represent itself as an agency of the Town of High Prairie.

**Initial to acknowledge:** \_\_\_\_\_