

<b>Policy Number</b> 46-2016	<b>Approval Date</b> 9 <sup>th</sup> , February 2016	<b>Resolution Number</b> 62/16, 219/10
<b>Supersedes</b> 46-2010	<b>Effective Date</b> 9 <sup>th</sup> , February 2016	<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 within 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.

**GENERAL PROVISIONS**

1.     Requests that involve a project that will provide an advertising medium for the Town in the form of banners, program advertising, signage, etc. If approved, funding will be allocated from the advertising budget. Examples would be Elks Stampede, Treaty 8 Hockey Tournament, etc.
2.     Where organizations are requesting funding over a number of years to complete a community activity with little or no advertising component is involved and the request is part of the project's overall fund raising. Examples would be STARS, Ukrainian Cultural Society, Little Smoky Ski Club, Community Band equipment, etc. Funding will be allocated from the Grants budget.

### **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 the budget has been set, Council shall set quarterly funding for the following months – January, April, July and October. Council shall not exceed the allotted quarterly funding. If the funding for any quarter is not used in its entirety it will be carried forward to the next quarter. Budget amounts that are totally allocated to grants, shall be split between advertising and grants in a proportion that Council believes is adequate, using the previous year's financial support/donation request allocated to organizations.

### **Eligible Applicants:**

2. Applications for Requests for Financial Support/Donations will only be accepted and considered from non-profit and/or charitable organizations; i.e.
- a) Operating inside the Municipality; or
  - b) Organizations considered by Council to contribute to the general interest, health, and/or welfare of the municipality in its entirety; or
  - c) 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 center, or
  - d) An organization or group assisting in the celebration of an event of public interest; or
  - e) 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:

- a) Be of sole benefit to an individual; i.e. any event that would bring reward to a single person rather than a benefit to the community as a whole.
- b) Has political, religious, or cause affiliation which would benefit a certain philosophy or belief, and/or support a particular philosophy, thought or belief over another.
- c) 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**

#### **Funding Formula**

- **Financial Support/Donations for Service(s):** (i.e. mandated parks, recreation, arts and culture, training, etc.)
- **Special Events:** (i.e. Community festivals, sports provincials etc)
  - i) If the service(s) or special event for the Financial Support/Donation request is being approved benefits the entire community or is available to all citizens of the community, the support/donation must not exceed 33% (1/3) of the service/special event's gross cost.
  - ii) If the service/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 service/special events gross costs.

### **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 organizations or society, a copy of its most recent financial statement, including in-kind support
- e) Proof of Community support (i.e. Letters 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.

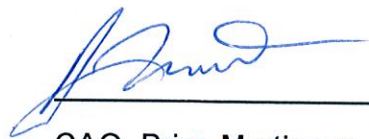
### **Application Quarterly Review Process**

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

- a) The application including supporting material, is submitted to Administration prior to the following dates: January 1<sup>st</sup>, April 1<sup>st</sup>, July 1<sup>st</sup>, and October 1<sup>st</sup> of the current year.
- b) Administration will apply policy to applications. Applications meeting the requirements will be placed on the first Council meeting on the following months, in their entirety in a Council Agenda package – January 1<sup>st</sup>, April 1<sup>st</sup>, July 1<sup>st</sup>, and October 1<sup>st</sup>.
- c) Council shall give priority to time sensitive applications.

Dated this day: February 12<sup>th</sup> 2016

  
\_\_\_\_\_  
Mayor, Linda Cox

  
\_\_\_\_\_  
CAO, Brian Martinson

**Schedule A**  
**Financial Support/Donation Request**  
**APPLICATION FORM**  
**For the**  
**Town of High Prairie**

***Deadline for Applications: 4:30 pm January 1<sup>st</sup> of current year.***

The contents of this application are considered public information and may be released upon request.

Legal Name of Organization: \_\_\_\_\_  
Mailing address: \_\_\_\_\_  
Postal Code: \_\_\_\_\_  
Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_  
Contact Person: \_\_\_\_\_  
Position: \_\_\_\_\_

Registered Society: \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_  
Society Registration Number: \_\_\_\_\_  
Is your society in good standing with the Registrar: \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_

Total Financial Support/Donation Request (in dollars): \$ \_\_\_\_\_

Which of the below items best describes your proposal (Check all that apply):

- ☐ Event Program Capital Project
- ☐ Arts and Culture Recreation and Sports
- ☐ Environmental, Social and Educational
- Participants/beneficiaries will primarily be:
  - ☐ Youth
  - ☐ Seniors
  - ☐ Disadvantaged Persons
  - ☐ Arts and Culture Recreation and Sports
  - ☐ Environmental, Social and Educational

**Declarations**

I hereby declare that if our organization is successful in obtaining funding from the Town of High Prairie that we give the Town of High prairie the right to review the project or event for which the monies were obtained to ascertain whether monies received were used for the stated purpose(s) set out in this application.

Signature: \_\_\_\_\_ Position: \_\_\_\_\_

## **General Information**

1. Describe the operation and history of your organization:
  
2. Describe the specific activity to which the funding would be applied:
  
3. List any organizations with whom you will collaborate or partner in the event or project and the contribution of each partner.
  
4. Please indicate how your organization will recognize the Town of High Prairie's contribution to your project or event.
  
5. Provide a budget with revenues & expenses for the project
  
6. What is Completion Date of Project?
  
7. Please list any assistance your organization has received from the Town of High Prairie in the previous years.

### **All applicants seeking assistance greater than \$1,000.00 must provide:**

In the event that the full amount of the assistance is not used for the purpose 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 should include 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 request 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:\_\_\_\_\_**