

**DISTRICT OF ELKFORD
CORPORATE POLICY MANUAL**

Policy Name: Financial and In-Kind Assistance Policy No: 2004-06

Date of Original Policy: July 23, 2001 Resolution No: 13967

**Date of Amendment: October 12, 2004 Resolution No: 15079
August 23, 2010 Resolution No: 17026
July 28, 2014 Resolution No: 18304
September 28, 2015 Resolution No: 18572
January 11, 2016 Resolution No. 18632**

Purpose

To establish a policy of Council that specifies the criteria for considering, and provide the authorization for approving or denying, requests for assistance.

General Policy

As authorized under the *Community Charter*, the District of Elkford supports the enhancement of the community by providing financial and in-kind assistance to not-for-profit and volunteer groups or organizations that enhance the quality of life in Elkford or promote the community when traveling to events away from Elkford.

Definitions

“Operating Costs” - are the expenses which are related to the operation of an organization. They are the costs of resources used by an organization just to maintain its existence.

“Capital Costs” - are fixed, one-time expenses incurred on the purchase of land, buildings, construction, or equipment used in the rendering of services.

“In-Kind Assistance” – when provided/granted, it can be given in goods, commodities or services instead of being paid for. Can also include discounted rates, free facility use, or donation of promotional items.

“Damage/Security Deposit” – is a sum of money paid in relation to a rented item (paid or in-kind) to ensure remuneration to the District in the event of property damage and/or an event cancellation resulting in a loss of revenue to the District of Elkford. Rates are set as per the Fees & Charges Bylaw.

“Regular Operating Hours” - varies per facility and is dependent on other bookings and facility use.

“Set Up and Clean Up” – any set up or clean up before or after an in-kind event will be the responsibility of the user/group. Should the user request for the District to do set up or clean up there will be a charge as per the Fees & Charges Bylaw.

Policy Procedure

1. Qualification

To qualify for assistance, the applying not-for profit or volunteer organization must be located in Elkford or have an active presence within the community. The District of Elkford will consider requests for assistance as follows:

a) Community Service Operating Grant (Financial, In-kind)

- Must foster the economic, social, cultural or environmental well being of the community.
- Must be for operating costs.
- Must be for the benefit of the entire community (as opposed to a small select group) and show a demonstrated high level of community support.
- Must provide evidence of fundraising or funding from other sources.
- Must demonstrate the need for assistance.
- Must submit a request for funding on an application approved by the District of Elkford. Applications must be received by February 28th each year.

Note: By December 31st each year, recipients of a Community Service Operating Grant are required to report to Council on the organization's activities, and report on how the grant received was utilized. Failure to fulfill this requirement may result in the denial of future requests.

b) Capital Works Grant (Financial, In-Kind)

- Must foster the economic, social, cultural, or environmental well being of the community.
- Must significantly benefit the community, as opposed to a few individuals, and show a significant level of community support.
- Must align with the District's goals and objectives for Community Development.
- May be to enhance an existing service in Elkford.
- Must not duplicate an existing service in Elkford.
- Must demonstrate the need for the works.
- Must demonstrate the need for assistance.
- Must provide evidence of fundraising or funding from other sources.
- Must submit a request for funding on an application approved by the District of Elkford. Applications must be received by February 28th each year.

Note: By December 31st each year, recipients of a Capital Works Grant are required to report to Council on the organization's activities, and report on how the grant received was utilized. Failure to fulfill this requirement may result in the denial of future requests.

c) Local Special Events (Financial, In-Kind, Promotion)

- Must foster the economic, social or the cultural well being of the community.
- Must significantly benefit the community, as opposed to a few individuals, and show a significant level of community support.
- Must attract attendance from outside of Elkford.
- Must demonstrate the need for assistance.

- Must provide evidence of fundraising or funding from other sources.
- Must submit a request for funding on an application approved by the District of Elkford. Applications must be received by February 28th each year. Other requests will be received for consideration throughout the year, and it is recommended to submit as well in advance of the event as possible on an application approved by the District of Elkford.

Note: Within 60 days following the event, recipients of a Local Special Events Grant are required to report to Council on the organization's activities, and report on how the grant received was utilized. Failure to fulfill this requirement may result in the denial of future requests.

d) Out of Town Events (Financial, Promotion)

- Application must be made by a local participant, or a local organization, or an Elk Valley organization with members from Elkford.
- Applications will be considered for participant(s) only (not coaches or supervisors).
- Financial requests will only be considered for participants under the age of 19. Adult participants will only be considered for promotional requests.
- Applications must be received at least 21 days prior to event (if possible).
- Consideration will be given for participants that qualified for a Provincial or National event at least 100 km from Elkford to be considered for a financial request.
- Must submit a request for funding on an application approved by the District of Elkford.
- Must provide evidence of fundraising or funding from other sources.

Note: Within 60 days following the event, recipients of an Out of Town Events Grant are required to report to Council on the organization's activities, and report on how the grant received was utilized. Failure to fulfill this requirement may result in the denial of future requests.

e) Permissive Tax Exemptions

- Must be a local property owning organization as defined by section 224 of the *Community Charter*.
- New groups requesting exemptions must demonstrate the financial need and submit an application by August 31st each year on a form approved by the District of Elkford to the Director, Financial Services.
- Must demonstrate that primarily Elkford residents use the service and the organization's regulations must allow Elkford residents to participate.
- Must demonstrate that the service is not otherwise provided in Elkford on a private or for profit basis.
- Staff is to review all existing permissive tax exemptions annually.

2. Consideration and Approval of Assistance Request

The District will provide financial and in-kind contributions to the following organizations as part of the annual budget process. Annual grant applications are not required.

Organization	Grant purpose	Reporting Requirement
Elkford Chamber of Commerce	Use of District facilities for the annual Moonlight Madness event	No reporting requirement
Elkford Figure Skating Club	Waive storage fees during summer months	No reporting requirement
Elkford Food Bank	Contribution in Lieu of sending out Christmas Cards	\$500 contribution No reporting requirement
Elkford Public Library	Annual Operating Funds	Annual request for funding. Separate meeting with Council if requested. Annual financial statement by Oct. 31 st each year.
Elkford Secondary School Senior Graduating Class	Use of Elkford Community Conference Centre for ceremonies and events	No reporting requirement. Must occur in a consecutive block of no more than 2 days
Elkford Triathlon	Use of District facilities	No reporting requirement

Annually, when reviewing the upcoming years grant applications, staff will report out to Council the estimated in-kind grants provided the previous year.

- a) **Community Service Operating Grant (Financial, In-kind)**
Capital Works Grant (Financial, In-kind)
Local Special Events (Financial, In-kind, Promotion)

Staff is to review, analyze, summarize and provide a recommendation to Council regarding all applications submitted under the above grant categories. At an annual Committee of the Whole meeting, Council will discuss, review and recommend approval based on the identified needs put forth and existing budget availability. Each applicant will then receive a letter notifying them of Council's decision.

- b) **Local Special Events (Financial, In-kind, Promotion)**

Requests for events that are not planned well in advance may be submitted for consideration. The requests may be approved per the following table, provided sufficient funds are available, and the request complies with the qualification criteria.

Type of Assistance	Amount	Approval Authority
Financial	Up to \$1,000	CAO
	Over \$1,000	Council
In-Kind	Up to \$1,000	CAO
	Over \$1,000	Council
Promotion (advertising Sponsorship)	Up to \$200	CAO
	Over \$200	Council

c) Out of Town Events (Financial, Promotion)

Requests for out of town events may be submitted for consideration. The requests may be approved per the following table, provided sufficient funds are available, and the request complies with the qualification criteria.

Type of Assistance	Amount	Approval Authority
Financial	\$50 per Elkford participant or member of a team to a maximum of \$1,000	CAO
	Over \$1,000	Council
Promotion	5 District pins per participant or other promotional items to a maximum of \$1,000 per organization	CAO
	Other promotional material valued over \$1,000	Council