POLICY DIRECTIVE NO. C-13

SUBJECT: COMMUNITY DEVELOPMENT INITIATIVES FUNDING POLICY

APPROVAL DATE: LAST REVIEW DATE: March 4, 2002

REFERENCE:

A.   **PHILOSOPHY:**

This Policy establishes an objective process within the predefined criteria to ensure equitable distribution of limited financial resources to support community development initiatives.

B.   **DEFINITIONS:**

"Comprehensive Municipal Plan" is the 10 year strategic/operational plan for the City of Chilliwack, which encompasses levels of service, growth, operating and capital requirements (costs), and financial analysis.

"Demographics" means the balance of population with regard to density and capacity for expansion or decline.

"City contribution" means the granting by the City of Chilliwack of financial or "in-kind" support (see below for definition of "in-kind").

"Initiative" means the planned community event, being the reason for the application.

"In-kind support" means a non-financial gifting by the City of Chilliwack for use of equipment, facility(s) and/or Human Resources (including expertise).

"Not for profit" organization means an organization that exists for the benefit of others without a goal of financial gain for its members. This is not restricted to societies nor registered charitable organizations.

"Performance Measurement" means the measurement of the actual activity levels of both service outputs and the resource utilizations required to achieve them

"Private sector" means privately operated business.

DEFINITIONS (continued)

"Proponents"   means applicants for a funding application.

"Spectator
 participant support"   means financial aid derived by a community from spectator and participant support of a festival or other community event.

"Unique opportunity"   means an initiative that is of a unique and positive experience for the community.

C.   **APPLICATION IN REVIEW PROCESS:**

1.   Complete appropriate form pursuant to Appendix B.

2.   Attach all required support materials as per funding application form.

3.   Submit application to Chief Administrative Officer by September 1st of each year.

4.   Chief Administrative Officer will allocate funding application to appropriate Department for comprehensive review and assessment.

5.   A report will be prepared for decision by City Council.

6.   Submission of Performance Report upon completion of project (or once annually).

D.   **REVIEW CRITERIA:**

Chief Administrative Officer

1.   Automatic Rejection Criteria:

(a)   The initiative would not be performed within the City of Chilliwack, and/or would remove spectator or participant support from this community.

(b)   The initiative would be solely for the benefit of an individual, i.e. any event that would bring reward to a single person rather than a benefit to the community as a whole.

(c)   The initiative 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.

REVIEW CRITERIA (continued)

(d)   The initiative is an out-of-town competition necessitating travel for participants and spectators to a location outside City boundaries.

(e)   The initiative's purpose is not to provide a service, function or facility that would normally be provided by the City of Chilliwack.

(f)   The initiative is for the benefit of an individual sport(s) team or special interest group which would prejudice the rights to benefit of any other sport(s) team or special interest group.

(g)   The primary purpose of the initiative directly competes with the local private sector thereby prejudicing the rights of the private sector to benefit they may otherwise receive, and/or may usurp potential income from the local private sector.

2.   General Criteria:

(a)   The initiative must present a unique opportunity to Chilliwack.

(b)   The initiative must demonstrate financial ability to operate. Proponents must include a financial plan that details first year and summarizes 10 year costs (*capital & operating*).

(c)   The initiative must demonstrate fulfillment of a community need and be supported by documentation.

(d)   The initiative must be associated with a function, facility or service that the City of Chilliwack would otherwise perform, facilitate or fund itself.

(e)   The initiative must demonstrate a financial need (*see financial plan*).

(f)   The initiative must recognize the City contribution in a significant and appropriate manner (*describe*).

3.   Additional Criteria:

(a)   Physical Asset: The applicant must be a "not for profit" organization and the initiative would revert to the City, or be owned by the City.

(b)   Special Event: The initiative must demonstrate an economic benefit to the community or demonstrate a promotional/cultural enhancement to the community. The applicant must be a "not for profit" organization.

(c)   Service Provision: The initiative must provide direct or indirect Municipal service. It must also demonstrate economic benefit to the community or demonstrate a promotional /cultural enhancement to the community.

E.   FINANCIAL REVIEW CRITERIA AND GUIDELINES:

1.   General Criteria Guidelines:

The cost of contribution to a funding application must be within City budget and the Comprehensive Municipal Plan. The most cost-effective means must be employed.

2.   Funding Formula:

(a)   Physical Asset:
       (i.e. building, equipment, etc.)

       (i)   benefits entire demographics and geographics of community;
       (ii)   maximum funding of 33% of net cost;
       (iii)   benefits a portion of the community defined by geographics or demographics;
       (iv)   maximum funding of 17% of net cost.

(b)   Special Events:
       (i.e. community festivals, etc.)

       (i)   Council initiative - City Event - up to 100% of net cost;
       (ii)   benefits entire demographics and geographics of community;
       (iii)   maximum funding of 33% of net cost;
       (iv)   benefits a portion of the community defined by geographics or demographics;
       (v)   maximum funding of 17% of net cost.

(c)   Service:
       (i.e. mandated parks, recreation, arts & culture, etc.)

       (i)   Council initiative - up to 100% of net cost;
       (ii)   benefits entire community;
       (iii)   maximum funding negotiable up to 100% of net cost;
       (iv)   benefits a portion of the community defined by geographics or demographics;
       (v)   maximum funding of 33% of net cost.

F. **PERFORMANCE REPORTING:**

1. Applicants that receive funding grants are required to report on the success of their project to City Council upon the completion of the project in the case of a physical asset or special event, or once annually in the case of funding for a service. Reporting is required to take place in the form of the submission of a completed Performance Report form, as provided in Appendix D of this Policy. Please refer to the City of Chilliwack's "Performance Measurement Guidelines for the Publicly Funded Organizations" document for further information on the City's Performance Measurement expectations for organizations receiving funding through this policy.
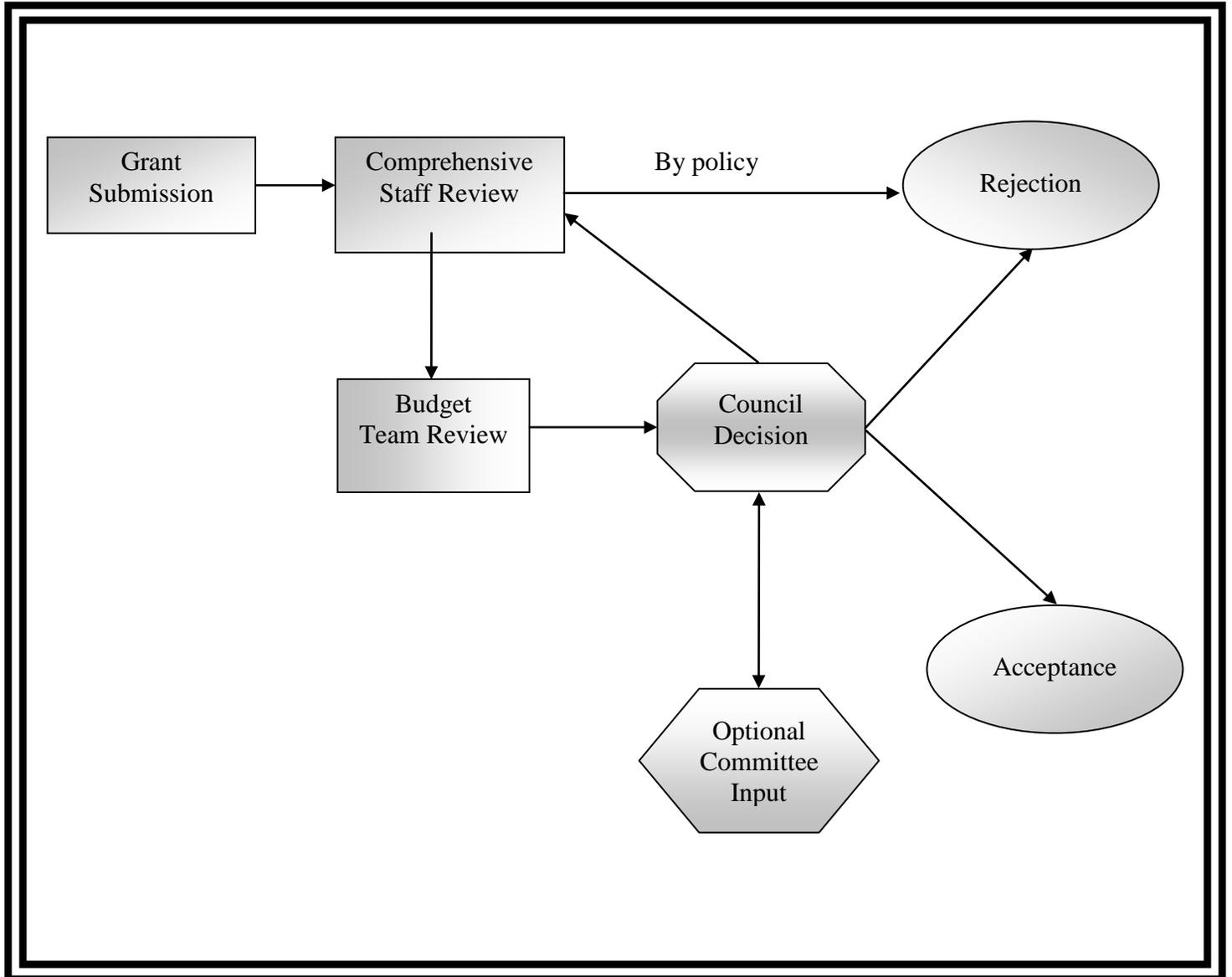
G. **APPENDICES:**

1. Appendix A - Process Flow Chart

2. Appendix B - Community Development Initiatives Funding Application
   B1 - Physical Assets
   B2 - Service Provision
   B3 - Special Event

3. Appendix C - Evaluation Checklist

4. Appendix D – Performance Report

_____
Chief Administrative Officer

PROCESS FLOW CHART

Grant Submission → Comprehensive Staff Review

By policy → Rejection

Comprehensive Staff Review → Budget Team Review

Budget Team Review → Council Decision

Council Decision → Rejection

Council Decision → Acceptance

Council Decision ↔ Optional Committee Input

Council Decision → Comprehensive Staff Review

Policy Directive C-13

Appendix B1

COMMUNITY DEVELOPMENT INITIATIVES
FUNDING APPLICATION
PHYSICAL ASSET

Group/Organization:	
Address: Street/P.O. Box	City/Province Postal Code
Contact Person: Please print full name	Telephone: ( ) (h); ( ) (w)
Initiative /Project Name:	Funding Requested: $

State Purpose/Objective: (Brief description, attach mission statement.)

Financial Plan: (Attach detail of 1st year Capital & Operating costs (*include in-kind support*), summary of years 2 – 10.)

Is this service currently offered in the community?:	☐ Yes ☐ No

Support: (Provide proof of community need, attach letters of support, etc.)

Recognition: (How will the City be recognized? (*e.g. ownership*) Are there other "partners" in initiative? Attach specifics.)

Benefits: (What are the direct and indirect benefits to the community? Attach detailed description.)

Policy Directive C-13

Appendix B2

COMMUNITY DEVELOPMENT INITIATIVES
FUNDING APPLICATION
SERVICE PROVISION

Group/Organization:	

Address:	Street/P.O. Box	City/Province	Postal Code

Contact Person:	Please print full name	Telephone:	( ) (h); ( ) (w)
Initiative /Project Name:		Funding Requested:	$

State Purpose/Objective: (Brief description, attach mission statement.)

Financial Plan: (Attach detail of 1st year Capital & Operating costs (*include in-kind support*), summary of years 2 – 10.)

Is this service currently offered in the community?:	☐ Yes ☐ No

Support: (Provide proof of community need, attach letters of support, etc.)

Recognition: (How will the City be recognized? (*e.g. ownership*) Are there other "partners" in initiative? Attach specifics.)

Benefits: (What are the direct and indirect benefits to the community? Attach detailed description.)

Policy Directive C-13

Appendix B3

COMMUNITY DEVELOPMENT INITIATIVES
FUNDING APPLICATION
SPECIAL EVENT

Group/Organization:	

Address:	Street/P.O. Box	City/Province	Postal Code

Contact Person:	Please print full name	Telephone:	( ) (h); ( ) (w)

Initiative /Project Name:		Funding Requested: $

State Purpose/Objective: (Brief description, attach mission statement.)

Financial Plan: (Attach detail of 1st year Capital & Operating costs (*include in-kind support*), summary of years 2 – 10.)

Is this service currently offered in the community?:	☐ Yes ☐ No

Support: (Provide proof of community need, attach letters of support, etc.)

Recognition: (How will the City be recognized? (*e.g. ownership*) Are there other "partners" in initiative? Attach specifics.)

Benefits: (What are the direct and indirect benefits to the community? Attach detailed description.)

COMMUNITY DEVELOPMENT INITIATIVES FUNDING APPLICATION
EVALUATION CHECKLIST

A.   **GENERAL CRITERIA:**

- Brief history of organization:

  _____

  _____

- Statement of purpose and objectives received
  Proof of community support

  Explain: _____

  _____

- Unique opportunity

  Explain: _____

  _____

- Financial ability for independent operation

  Explain: _____

  _____

- Associated with a function, facility or service that the City would normally perform

  Explain: _____

  _____

- Community need and benefit (*enhancement of quality of life*)

  Explain: _____

  _____

- Financial need (*current financial statements, including in-kind support*)

  Explain: _____

  _____

- Recognition of City contribution

  Explain: _____

  _____

- (a) Physical Asset
  - ➢ Not-for-profit organization
  - ➢ Reversion to City /owned by City

- b) Special Event
  - ➢ Economic benefit to the community
  - ➢ Promotional/cultural enhancement to the community
  - ➢ Not-for-profit organization

- (c) Service Provision
  - ➢ Direct or indirect Municipal service
  - ➢ Economic benefit to the community
  - ➢ Promotional/cultural enhancement to the community

B.   FINANCIAL CRITERIA:

- Within City Budget
- Within Comprehensive Municipal Plan
- Employing most cost-effective initiative means

- (a) Physical Asset

  - ➢ Description of financial benefit to community:

  _____

  _____

  - ➢ Reaches entire demographics and geographics of community
    - maximum funding of 33% of total cost
  - ➢ Benefits a portion of the community defined by geographics or demographics
    - maximum funding of 17% of total cost

- (b) Special Events

  - ➢ Council initiative/ City event - 100%
  - ➢ Reaches entire demographics and geographics of community
    - maximum funding of 33% of net cost
  - ➢ Benefits a portion of the community defined by geographics or demographics
    - maximum funding of 17% of net cost

- (c) Service

  - ➢ Services entire community
    - maximum funding negotiable up to 100% of net cost
  - ➢ Services a portion of the community defined by geographics or demographics
    - maximum funding of 33% of net cost

Policy Directive C-13

Appendix D

COMMUNITY DEVELOPMENT INITIATIVES
FUNDING APPLICATION
PERFORMANCE REPORT

Group/Organization:	

Address:	Street/P.O. Box	City/Province	Postal Code

Contact Person:	Please print full name	Telephone:	( ) (h); ( ) (w)

Initiative/Project Name:	

Initiative Time Frame:	From: (DD/MM/YR) To: (DD/MM/YR)

1. Provide an outline of all expenditures associated with the project/services:

a) Salaries $_____

b) Supplies   _____

c) Materials   _____

d) Contracted services   _____

e) _____   _____

f) _____   _____

g) _____   _____

h) _____   _____

i) _____   _____

j) _____   _____

k) _____   _____   Total Expenses $_____

2. Describe the result achieved: (*if it is a physical asset, please provide photographs*)

3. Service Provision Performance Report: (*Please complete this section only if the funding was for a service provision or event initiative*)

Please complete all applicable:

Measurement	Metric	Predicted Performance	Actual Measured Performance
a) Event attendees or served customers	Each	_____	_____
b) Response time (*average elapsed time from receipt of request to delivery of service*)	Hours	_____	_____
c) Cost per customer (*attendee*)	Dollars	_____	_____
d) Quantity of service #1 delivered _____ (*specify*)	Each	_____	_____
e) Quantity of Service #2 delivered _____ (*specify*)	Each	_____	_____
f) Quantity of Service #3 delivered _____ (*specify*)	Each	_____	_____
g) Quantity of Service #4 delivered _____ (*specify*)	Each	_____	_____

Other measures (*specify*):

h) _____	____	_____	_____
i) _____	____	_____	_____
j) _____	____	_____	_____
k) _____	____	_____	_____
l) _____	____	_____	_____
m) _____	____	_____	_____
n) _____	____	_____	_____
o) _____	____	_____	_____
p) _____	____	_____	_____