



# DISTRICT OF WEST KELOWNA

## COUNCIL POLICY MANUAL

Approval Date: 2011-May-10

|  |
|--|
| <b>SECTION:</b> FINANCIAL SERVICES             |
| <b>SUBJECT:</b> REQUESTS FOR FINANCIAL SUPPORT |

### **Policy Statement:**

The District of West Kelowna recognizes that valued contributions are being provided to the community-at-large through the volunteer efforts of local organizations, individuals and agencies. Consideration of “one-off” financial assistance requests (both cash and in-kind) demonstrates Council’s commitment to working with these groups wherever and whenever possible to support their efforts.

### **Purpose:**

Recognizing that Council has a policy to encourage applications for funding through the grant-in-aid process and that Council has a limited way of allocating discretionary funds, this policy is intended to establish a consistent and considered process for dealing with applications for financial support outside of the “Grant-in-Aid” policy and process. Through this policy, Council also authorizes staff to deal with “in-kind” only requests up to \$1,500 in value and provide Council with an annual report of these requests and their disposition.

### **Policy Procedure:**

Requests for financial support that fall outside the parameters of Council’s “Grant-in-Aid” policy, are to be submitted to Council for consideration through the Manager of Finance and are to be accompanied by adequate supporting information including but not limited to the following items:

- Name, address, contact information for the organization requesting funding,
- A full description of the intended use of the requested financial support,
- Full details of the date, time, place and scope of the event/activity as well as the number of participants and others who may benefit from the event,
- Complete disclosure of the budgeted revenues and expenses for the event,
- Disclosure of any and all other applications for financial support to other agencies, organizations, etc.

### **Review Process:**

The Manager of Finance will review all incoming applications for completeness and follow-up with applicants, if necessary, to obtain all required information. Once complete, applications for “cash” support as well as “in-kind” requests greater than \$1,500 will come forward for Council’s consideration as part of a regular or committee-of-the-whole meeting agenda. Given that Council has limited discretionary funds and that proper consideration of requests for financial support is the goal of

this policy, a waiting period for thorough consideration of requests under this policy is established to run from the time of presentation to Council to the beginning of the subsequent Council meeting.

Applications for “in-kind” support up to \$1,500 will be referred to the appropriate DWK department for consideration and must have the endorsement of the CFO or designate prior to approval.

**Notification and Payment:**

Applicants will be notified in writing of the results of Council’s deliberation together with any applicable terms, conditions and/or restrictions. Payment of any cash support awarded will accompany the letter of notification.

|                           |
|---------------------------|
| Previous Revision/s: None |
|---------------------------|