



Policy Number:	5300-01		
Policy Name:	City Support of Community Service Organizations		
Adoption Date:	Draft	Revision Date:	
Approved By:		Expiration Date:	

1. Scope

[Is this a City wide policy - will this policy apply to employees in more than one department? Who will be responsible for compliance of this policy? Who will this policy apply to and under what circumstances?]

This policy applies to City Council to guide its decisions to commit City resources to Community Service Organizations (CSOs). It also applies to all City staff responsible for administration of CSO requests and distribution of committed resources, and to the CSO applicants to aid in their understanding of Council's award criteria and conditions.

2. Purpose / Background

[Why is this policy needed? What is the issue or opportunity this policy will address? How will this policy address the issue/opportunity?]

Council has historically provided cash and in-kind support to CSOs. Such requests are primarily requested during the operating budget process in October, and are ultimately reflected as expense appropriations in the CSO department budget. Applicant profiles and support criteria have changed over time, but without any formal framework to guide council, management, and applicants.

In 2021 management held a workshop to address the process, during which time Council established a working group to re-draft policies and procedures in advance of the annual operating budget process.

The working group has articulated the objectives of CSO funding, has defined CSO, has re-categorized former CSOs based on new definitions, and has drafted application and funding criteria based on these objectives and definitions.

The new policy was presented to Council on during their regular meeting on 4/20/2021, and was distributed to CSOs in advance of that meeting. Following a discussion of that agenda item, the policy was revised to reflect Council direction, and will be implemented as management begins preparing the 2022 City budget.

3. Policy

[Set of general guidelines. It outlines the plan for tackling certain issues. Should be: Clear and concise using simple language (avoid acronyms or jargon). Explains the rule NOT how to implement the rule (this is address this in procedures)]

City Council will consider requests to provide resources to non-profit organizations that provide support services and/or programming that enriches local culture, where such services and programming are not already provided by City departments.

Council will establish and periodically revise application and award criteria, budgeting parameters, overall objectives, and specific expectations for individual applicants. These policies, procedures, and subsequent revisions will be formally adopted in the *Council Policies and Procedures* document.

4. Procedures

[Explain a specific plan of action for carrying out the policy. Steps to be taken, action/approvals needed, etc.]

Council Goal-Setting: Council will annually affirm or revise their objectives and support parameters in advance of the budgeting process, and will direct management to publish and disseminate this information to potential applicants.

Annual Budgeting: Council will consider resource requests submitted through a standardized application, which is to be designed by staff to reflect Council's support objectives. Staff will compile submitted applications for council review not less than three weeks prior to a scheduled appropriations-setting workshop dedicated to CSO requests.

CSO applicants are to include events-funding in their requests. (Applicants who are requesting *only* events-funding will follow a separate application procedure overseen by the City's Economic Development department.

CSO/Budget Workshops: Finance Staff will compile applications and distribute materials to Council not less than three weeks prior to a scheduled designated CSO/Budget workshop. Not less than one week prior to the scheduled workshop, Council will direct staff as to which applicants are approved-as-submitted. These approved applicants are not required to attend the workshop. Remaining applicants will be required to attend the CSO/Budget workshop for a discussion of their respective requests. At the conclusion of the workshop, Council will provide direction about specific CSO appropriations, metrics, and other conditions of continued funding. Finance staff will oversee and calendar any related follow-up items as directed by Council.

Ongoing Evaluation: With each budgeting cycle, or more frequently as needed, Council will review applicant data to ensure that CSO operations reflect mission statements as presented to Council, that City grants are expended as represented in CSO grant-applications, and that City-funded outlays and programming yield a satisfactory result. Such evaluation will be documented and used as a basis for Council consideration of future applicant funding requests.

5. Limitations / Approvals / Responsibilities

[When can there be exceptions to this policy? Who can authorize exceptions? Does this policy require City Council approval? Who is responsible for administering this policy? Is this a short term or temporary policy? What is the anticipated time line this policy should stay in effect?]

All policies are subject to amendment. Please refer to the City of Valdez Shared Folder for the official, most recent version.

Funding requests must be made via approved application, completed according to instructions, and returned by the specified deadline. Application links and deadlines will be published and disseminated by Finance staff not later than August 1 annually.

Beginning with the 2022 Budget, Council will limit CSO grant awards to not more than 50% of the applicant's total budget.

Applicants requesting \$100,000 or more must provide their most-recent third-party financial audit.

CSO applicants may not be component units of the City.

Council will not consider funding requests for the provision of services currently offered locally by the City, by other political subdivisions, by private-sector entities, or by other CSOs.

Council may allow exceptions to any limitations specified above. During the annual budgeting cycle, staff will forward application materials to Council as submitted, and will identify any requested exceptions to specified limitations. Funding requests outside of scheduled annual budgeting must be initiated through the City Clerk's office for inclusion on a Council regular-meeting agenda.

6. Definitions

[Define unusual terms or words as they are to be understood in context of this policy.]

Community Service Organization – a local or regional non-profit organization providing services for the cultural enrichment of Valdez.

Event – a planned gathering on a specific day or series of consecutive days, usually recreational, educational, or entertainment-based.

In-Kind Support – provision of non-cash City assets, such as personnel, equipment, materials, land, or other assets.

Non-profit – an entity established and registered with an IRS 501 designation.