

CIVIC ORGANIZATION FUNDING REQUEST POLICY

1.0 Purpose:

- 1.1 The City of Lake Forest is fortunate to have numerous not-for-profit community organizations and/or civic organizations that provide desirable services within the community.
- 1.2 These organizations may receive tax dollars or public funds to help support their efforts, or from time-to-time, request additional extraordinary financial capacity from the City of Lake Forest to develop or expand their programs and services to enhance the economic, cultural and social benefit they provide to the City and its residents.
- 1.3 The City of Lake Forest must ensure that it is fiscally responsible and at all times accountable for the expenditure of public funds. Therefore, the City has adopted a process and Financial Assistance Request Application for the purposes of 1) establishing guidelines and requirements for requesting agencies, 2) standardizing a request procedure, and 3) enhancing reporting capabilities to monitor and track requests made by civic organizations that benefit the Lake Forest community.

2.0 Definitions:

- 2.1 Civic Organization: Any not-for-profit association, partnership, organization, committee, council, commission, club, Illinois not-for-profit corporation, or other non-partisan or overtly political entity that provides or sponsors services, programs or special events for public benefit or public enjoyment on a not-for-profit basis.

3.0 Policy:

- 3.1 All Civic Organizations requesting funds from the City of Lake Forest shall submit a Financial Assistance Request Application. The Application shall include a narrative of the Civic Organization's primary mission and goals and state specifically how the services or programs proposed will benefit the Lake Forest community and detail on the amount of funding requested and the purposes of the anticipated expenditures from City funds.
- 3.2 By submitting a request for funding, a Civic Organization becomes responsible for the completion of all applicable guidelines and agrees that it has met all requirements as required by this Policy. Civic organizations failing to submit the Financial Assistance Request Application and all required documentation in support of such request may not qualify for funding consideration.

- 3.3 The City of Lake Forest may elect to approve, disapprove, or modify any financial award of public funds payable to Civic Organizations or to an individual Civic Organization in its sole and absolute discretion. Additionally, the receipt of public funds to a Civic Organization from the City in any year shall not be relied upon or give rise to an expectancy that a Civic Organization will receive any or a similar amount of funding from the City in any future year.

4.0 Application Requirements: Each Civic Organization requesting funding from the City shall submit to the City Manager of the City of Lake Forest or his/her designee, the following:

- 4.1 A completed Financial Assistance Request Application along with all required exhibits and attachments on the form as set forth on Attachment A;
- 4.2 A summary or explanation outlining the scope and purpose of the financial assistance request by the Civic Organization;
- 4.3 A proposed budget, as outlined on the form in Attachment B, showing amount and types of receipts and expenditures anticipated for the present and next succeeding one (1) year for the program or project;
- 4.4 If the Civic Organization is a recognized 501(c)(3) tax exempt entity, (a) a copy of a completed IRS Form 1023 under Section 501(c)(3) of the Internal Revenue Code, (b) a letter of recognition of 501(c)(3) status from the IRS, and (c) a copy of your organization's most recent audit; and
- 4.5 A copy of IRS Form W-9 for the Civic Organization.

5.0 Standards and Criteria for Awarding Funds to Civic Organizations: The Corporate Authorities, City Manager or his/her designee shall consider the following established criteria in considering a financial assistance request from a Civic Organization:

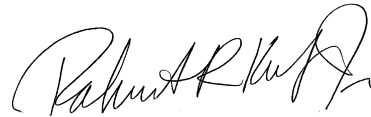
- 5.1 The program or project is being administered or sponsored by a Civic Organization that is based and/or serves a majority of residents within the City of Lake Forest, Illinois;
- 5.2 The program or project will provide economic, cultural and/or social benefit to the City and its residents;
- 5.3 The Civic Organization has demonstrated a financial hardship or inability to fund the program or project for which it is requesting financial assistance;
- 5.4 The nature of the program or project requires a one-time donation and not ongoing operational or programmatic support, such as for one-time event or capital assets or capital improvements, including, equipment, land/property, buildings;
- 5.5 The financial assistance request has a limited financial impact on the City; and
- 5.6 Any other criteria which may provide the Corporate Authorities, City Manager or his/her designee, a reasonable ability to award such financial assistance request.

6.0 Authorization of Contributions:

- 6.1 All contribution request amounts will be authorized and distributed in a manner that is consistent with the established purchasing policies and procedures as outlined within Administrative Directive 3-5.
- 6.2 If a financial award is granted to a Civic Organization in the immediately preceding year by the City of Lake Forest, a complete Post Funding Report on form as set forth on Attachment C.

7.0 Distribution:

Employee Information Site, www.citylf.org.



Robert R. Kiely, Jr.
City Manager