

## **CITY OF BARRE OUTSIDE ORGANIZATION FUNDING POLICY**

### **PURPOSES:**

Pursuant to section 307 of the Barre City Charter, the Council establishes this policy to:

- Establish a fair, consistent, and predictable process for consideration by the City Manager, Council and voters of outside organization funding requests from the City's general fund budget;
- Manage the upward pressure on the tax rate; and
- Allow for electronic petition signatures during a state of emergency to protect public health, if authorized by law.

### **PERSONS AFFECTED:**

- Outside organizations advancing a public interest (including but are not limited to health and welfare, cultural development, economic development, and social services);
- Beneficiaries of outside organizations;
- City staff;
- City Council; and
- City Clerk & Treasurer

### **APPLICATION**

- Effective July 1, 2021.
- This Policy applies to all outside organizations with tax exempt status legally incorporated with the State of Vermont seeking a general fund appropriation from the City of Barre voters.
- This Policy does not apply to organizations receiving a direct allocation from the Manager's Council-approved, General Fund budget, which may be included in the Manager's budget as dues, taxes, or direct funding.

### **POLICY & PROCEDURE**

1. In accordance with the timeline of Section 406 of the City Charter, the City Manager must recommend a budget amount for outside organization funding based on a comprehensive review of needs and tax rate priorities.
2. Not later than 90 calendar days prior to the annual meeting, the City Manager (or designee) will notify outside organizations that have duly petitioned for funding in the past and were allocated funding in the prior fiscal year to remind said organizations to submit level-funding requests for the next fiscal year within 30 calendar days. All such funding requests must be submitted on a standard form created and maintained by the City Manager (or designee) to obtain necessary information for review and include the following: 1) the most recently completed year-end balance sheet, and budget-to-actual revenues and expenditures (profit & loss report); 2) the most recent 990 or equivalent; 3) list of current board members and 4) copy of IRS determination letter.
3. The City Council will meet to review the prior year's organizational report and funding requests, and determine outside organization funding amounts within the

Manager's recommended budget, not to exceed the prior year's budget, based on the following priorities:

- a. Is the application complete?
  - b. Does the organization have a long-term and sustained funding relationship and demonstrate successful outcomes?
  - c. Does the organization provide necessary and direct service(s) to residents of the City that focuses on a population or service area with a demonstrated need for, or lack of, a specific service?
  - d. Is the organization located within the city and/or provide substantial services to residents of the city?
4. The City Manager (or designee) must notify outside organizations of City Council's funding determinations to the contact of record provided on the request form in writing within 5 days of the meeting.
  5. Funding endorsed by City Council shall be bundled and placed on the ballot for voter consideration as a single article.
  6. Outside organizations whose funding was reduced or eliminated by Council from the prior year's voter-approved amount may file a written appeal within 5 calendar days of the decision to the City Clerk to be placed on the ballot to maintain the prior year's funding amount as a separate article on the annual meeting ballot for consideration by the voters. The City Clerk shall grant all appeals.
  7. Outside organizations that did not receive funding from the City in the prior year's budget shall be considered new requests (even if previously funded in other years) and be required to petition their request for inclusion on the annual meeting ballot. Such requests will appear as a separate article on the annual meeting ballot for consideration by the voter.
  8. Outside organizations that request an increase in funding from the prior year's approved budget are required to duly petition their request for inclusion on the annual meeting ballot. Such requests will appear as a separate article on the annual meeting ballot for consideration by the voters.
  9. Outside organizations required to petition for inclusion on the annual meeting ballot must submit a petition in accordance with Vermont Statutes Annotated 17 VSA §2642(a) and Barre City Charter and must be signed by at least 10% of the City's registered voters. This petition must state the exact question to be included in the ballot in accordance with this policy not less than 47 days before the day of the Annual Meeting.
  10. Notwithstanding other provisions of this policy, petitions in form and content approved by the City Clerk containing electronic or digital signatures of duly registered voters of the City will be accepted during a declared state of emergency when necessary to protect public health, if authorized by general law.
  11. Any organization receiving funding from the City must submit a report for the City's Annual Report not to exceed one page in order to receive notice under paragraph 2 of this policy and be eligible for consideration in the manager's recommended budget. This report must be for the organization's most recent fiscal year in which the voter-approved support was received. The report must be submitted to the City Manager's Office (or designee) by September 1<sup>st</sup> following the end of the fiscal year.

12. For questions concerning requests to be placed on the Annual (Town) Meeting ballot, please contact the Town Manager (or designee).

## **REFERENCE**

- Adopted by City Council on February 14, 2006.
- Revised and adopted by City Council on July 22, 2008.
- Revised and adopted by City Council on August 2, 2011
- Revised and adopted by City Council on June 6, 2017
- Revised and adopted by City Council on October 3, 2017

Revised and adopted this 27th day of October to be effective 1<sup>st</sup> day of July 2021, as certified by the City Clerk

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Carol Dawes

Filename: Barre City Council\_Adopted Voter APPROVED Funding Policy\_Oct 2020  
Directory: C:\Users\cdawes\Documents  
Template: C:\Users\cdawes\AppData\Roaming\Microsoft\Templates\Normal.dot

m

Title:  
Subject:  
Author: Jake Hemmerick  
Keywords:  
Comments:  
Creation Date: 1/5/2021 3:39:00 PM  
Change Number: 2  
Last Saved On: 1/5/2021 3:39:00 PM  
Last Saved By: Carol Dawes  
Total Editing Time: 2 Minutes  
Last Printed On: 2/16/2021 11:44:00 AM

As of Last Complete Printing

Number of Pages: 3  
Number of Words: 914 (approx.)  
Number of Characters: 5,212 (approx.)