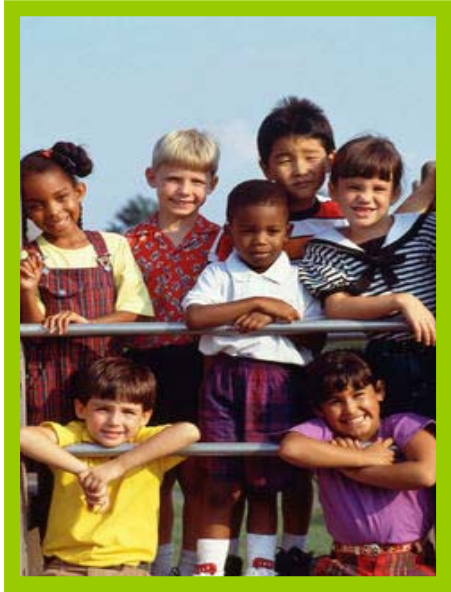


Community Sponsorship Policy



City of Ocala
Adopted by City Council on January 6, 2009

The City Council recognizes the importance of providing support for community programs, festivals, parades, athletic events and celebrations that are held for the general economic benefit of the City's business community; support of non-profit organizations serving Ocala's citizens; cultural, athletic and educational enrichment; and/or promotion of the City of Ocala. In order to expand access to a wide range of cultural experiences and community connections for all its residents, the City of Ocala provides limited assistance through fee waivers and cash sponsorships to local organizations in support of community programs.

The City intends to fund **programs** as opposed to organizations in general. Therefore, applications for funding must be for **programs** operated by an organization as opposed to a contribution to an organization's general operating expenses. The intent is that the general public will receive some intrinsic cultural, educational, or entertainment value from the program even though the participant might not benefit from the services provided by the organization in general.

PURPOSE

The purpose of this policy is to set parameters for the waiver of city support services and cash sponsorships for community programs conducted by local organizations.

DEFINITIONS

Community Sponsorship Fund – Funds set aside by City Council each year to offset the costs of providing city support for community programs.

Organization – Includes for-profit or not-for-profit agencies and corporations registered to do business in the State of Florida; educational institutions; government agencies.

Program – A celebration, event, fundraiser, athletic, cultural or educational activity as further described below.

Athletic/Sports Programs – Recreational athletics/sports programs which are open to the general public for participation and which serve participants of multiple ages groups or categories.

City Programs – Events and programs coordinated by the City of Ocala Recreation and Parks Department.

Educational Programs – Community programs which contribute to improved education and literacy for Ocala's citizens.

Fundraiser Programs – Community programs held for the primary purpose of raising funds for a non-profit organization and for which other intrinsic cultural, athletic, entertainment or educational value is provided for the benefit of the public.

Spirit Programs – Community programs held for the sole purpose of exposing the public to cultural or educational enrichment or public entertainment.

Sponsorship: Support provided by the City of Ocala in the form of a fee waiver for City services provided or cash donation as further defined below.

Cash Sponsorship – A sponsorship in cash to the organizing agency which may be used to offset the costs of program operations and/or non-city services.

Fee Waiver Sponsorship – A sponsorship which involves the waiver of labor and equipment costs that otherwise would be due to the City.

POLICY/PROCESS

Sponsorships for eligible organizations and programs will be considered upon filing a sponsorship application with the Recreation and Parks Department no less than 45 days and no more than one year before the program date.

Sponsorship applications (including financial affidavits) that are filed for parades/events subject to the City of Ocala codes and regulations must be filed in conjunction with or after processing of a completed parade/event application. Program organizers should plan to contact the Recreation and Parks Department as soon as possible to allow ample time to process the parade/event permit and sponsorship application. Minimum timelines for parade/events application submittal are outlined in the City of Ocala Code of Ordinances Chapter 66 Article V.

In the case of partial funding for parade/events, costs owed to the City, other than those covered by a sponsorship per this policy, shall be borne by the sponsoring community organization and are due and payable in accordance with the parade/event permit.

Sponsorships will only be provided for services, programs, and organizations meeting the eligibility criteria stated in this policy.

The budget for the community sponsorship program, including determination of the source of funding to offset this sponsorship program, shall be established by City Council each year during the annual budget process. The Recreation and Parks Department shall be responsible for accounting for the community sponsorship fund; shall keep a listing of all organizations and programs receiving sponsorships through this program; and shall maintain a balance of funds available. The total of all sponsorships awarded each fiscal year shall not exceed the established budget without City Council approval.

Parade application fees and permit fees required by the City of Ocala Code of Ordinances will not be waived. These fees must be paid by the applicant organization to the appropriate City agency. Failure to comply with the City permitting requirements and to pay all fees due in a timely manner will result in the organization being ineligible for future sponsorships. If past due fees are paid in retrospect, future sponsorships may be requested after a one year hiatus.

Organizations requesting and receiving sponsorships must submit pre and post program financial affidavits. The pre-program affidavit must accompany the sponsorship application. The post-program affidavit is due to the City within 30 days after the program. Organizations who fail to submit the post-program affidavit will not be eligible for future sponsorships.

FUNDING LIMITS

In order to ensure that community sponsorship funds are available to support programs held throughout the year, no more than 80 percent of community sponsorship funds will be awarded for programs to be held prior to May 30th. Funds that have not been committed for current fiscal year programs by August 15th of each year, may be utilized to fund programs to be held in October of the next fiscal year. The purpose of this is to avoid delays in awarding funds for October programs, funds for which are not typically available until Council approves the subsequent fiscal year budget at the end of September.

Community sponsorships may be provided to eligible organizations according to the below listed schedule.

Athletic/Sports Programs: Cash sponsorships shall not exceed \$1,000 per year per athletic/sports organization. Fee Waiver sponsorships are allowed for equipment fees only.

City Programs:	100% of fees and labor costs may be waived and/or cash sponsorship for the first year of the program only. No program will receive more than \$4,000 in cash and fee waiver sponsorships combined.
Educational Programs:	100% of fees and labor may be waived. Cash sponsorships shall not exceed \$1,000 per program. No program shall receive more than \$2,000 in cash and fee waiver sponsorships combined.
Fundraiser Programs:	50% of fees and labor may be waived. Cash sponsorships shall not exceed \$1,000 per program. No program shall receive more than \$2,000 in cash and fee waiver sponsorships combined.
Spirit Programs:	100% of fees and labor costs may be waived. Cash sponsorships shall not exceed \$2,000 per program. No program shall receive more than \$4,000 in cash and fee waiver sponsorships combined.

Further restrictions on funding for programs not held on City property are outlined in the eligibility criteria section.

No organization shall receive more than \$6,500 in cash and fee waiver sponsorships combined in any fiscal year.

The City of Ocala reserves the right to implement any other sponsorship limits necessary to keep the sponsorship program within the budget approved by City Council and as necessary to ensure that the sponsorship funding is equitably distributed to maximize the impact to all City residents and residents within the City of Ocala utility service area.

APPLICATION REQUIREMENTS

Each applicant will be required to submit:

- 1) A community sponsorship application on a form approved by the Recreation and Parks Director, indicating the program dates, times and location, the local office/headquarters of the organization, the organization's purpose/mission, the purpose of the program, expected number of participants, statement that an admission fee (gate, parking, ticket or otherwise) will not be charged (except as otherwise provided for under eligibility requirements for fundraiser events) and that the program will be open to the general public, and how the organization and proposed program will benefit residents of Ocala and the Ocala utility service area.
- 2) A financial affidavit showing the proposed profit or loss for the program on a form approved by the Recreation and Parks Director. The financial affidavit must include income from all sources; and all program expenditures listed by category including but not limited to booth rentals, sound and production, facility rental, food and beverage, concessions, staff, advertising, etc. City staff will add in costs of City services and permit fees once the affidavit has been submitted. In-kind contributions and volunteer services shall be listed; however, net profit/(loss) shall be determined on a cash basis not including in-kind and volunteer resource totals. The budget will be used to determine the extent to which an organization has obtained diversified funding, in-kind contributions and volunteer resources to leverage the City's fee waiver. Financial affidavits that show a deficit must clearly explain how the deficit will be handled.
- 3) Current proof of 501c3, Florida contribution registration number and/or other non-profit status must be provided if for a fundraiser program.
- 4) A copy of the program's sponsorship criteria/guidelines that outlines the program's sponsorship categories and benefits of sponsorships at various sponsorship levels.

Incomplete applications will be returned to the applicant and will not be processed.

APPLICATION REVIEW/APPROVAL

Sponsorship applications will be reviewed for eligibility and financial impact by the Recreation and Parks Department and processed for approval by Council or the Recreation and Parks Director per this policy. City staff will advise the organizer of a new event when the issue will go before City Council if applicable. The organizer should be present at this meeting to respond to questions.

Approval of sponsorship requests up to \$1,000 will be by the Recreation and Parks Director. Approval of sponsorship requests over \$1,000 will be by City Council. Approval of these same programs for same amounts in second or subsequent years shall be by the Recreation and Parks Director.

ELIGIBILITY CRITERIA

1. The City may provide sponsorships for city, fundraiser, spirit or athletic/sports programs as defined in the definitions section of this policy. Programs that do not meet the objectives identified within these definitions will not be eligible for sponsorship funding.
2. The City will not award sponsorships to any religion, church, creed or sectarian organization to promote religious purposes. Religious organizations are not excluded from sponsorships; however, the purpose of the program must be as described in the definitions section of this policy and shall not serve to promote a religious message as the primary purpose. Religious organizations are not eligible for sponsorships for fundraising programs.
3. Political organizations and/or individual campaigns are not eligible for sponsorships for programs they conduct.
4. Organizations that discriminate on the basis of age, race, sex, or national origin are not eligible for sponsorships for programs they conduct.
5. Individuals are not eligible for sponsorships for programs they conduct.
6. For-profit organizations holding fundraiser programs must identify a 501c3 or Florida not-for-profit corporation as a recipient of the program proceeds and provide acknowledgement of receipt of said proceeds from that non-profit organization with the post-program financial affidavit.
7. For-profit organizations are not eligible for sponsorships for promotional programs for which the organization/corporation or its employees or officers will gain personal benefit (i.e. a sales promotion).
8. Not-for-profit organizations and/or programs to which the City already contributes through substantial time and employee contributions are not eligible for funding through the community sponsorship program (i.e. United Way, March of Dimes, Stuff the Bus, etc.)
9. Only registered Florida not-for-profit organizations or those registered as a non-profit organization for tax purposes (i.e. 501 C-3) may conduct programs primarily as fund-raisers and be eligible for sponsorship consideration. These programs must provide a benefit to Ocala citizens or those living in the Ocala utility service area; and the organizations holding these fundraiser programs must primarily serve Ocala residents or those living in the Ocala utility service area.
10. City programs are eligible for funding the first year of operation only. After the first year, these program costs shall be budgeted in the sponsoring departments' budgets. This eligibility criteria will be effective the second fiscal year of the sponsorship policy implementation (FY2010) and each year thereafter.
11. Programs must generate less than \$50,000 in net revenue (based on financial affidavits from the prior year's program if applicable and the pre-program financial affidavit for the current year) to be considered for a sponsorship. Those programs that receive sponsorship and for which post-event financial affidavits show net revenue exceeded the \$50,000 threshold shall reimburse the City of Ocala for all sponsorships (fee waiver and cash sponsorships). The City reserves the right to request a copy of the organization's annual IRS 990N form as needed to verify net revenues from the program.
12. Programs must be open to the public and free of charge, except:
 - a. Athletic/sports programs may charge participant fees, but not admission fees (gate, parking, ticket or otherwise).
 - b. Fundraiser programs may charge a fee of no more than \$50 per participant.

13. Programs held on other than city property shall not be eligible for fee waiver sponsorships for equipment fees unless the organizing agent can arrange for delivery of said equipment by a responsible agency (i.e. County parks staff for events on county property). The City reserves the right to require a deposit or a certificate of liability before transport of equipment.
14. Programs held on other than City property shall not be eligible for waiver of labor costs from the sponsorship fund (i.e. garbage pickup, electrical, etc) except for those services provided for by code or statutory requirement (i.e. police, fire).
15. The sponsoring organization must also agree to do the following (failure to do so will result in future ineligibility):
 - a. Obtain all required permits, clearances, insurances and program authorizations in a timely manner, in compliance with the City of Ocala Code of Ordinances.
 - b. Acknowledge the support of the City of Ocala where appropriate, and to include on all printed information and advertising related to the event for which sponsorship was provided the following statement: ***“This program/event is funded in part by the City of Ocala.”***
 - c. Allow the City of Ocala to have a sponsor booth at the program/event if the City so desires (at programs/events where a sponsorship booth is appropriate) for the purposes of distributing information regarding City services and community programs. This booth shall be provided at no cost to the City. The City will provide a tent, tables, chairs, etc. (including permits where necessary) for this purpose.
 - d. Sports/Athletics Sponsorship recipients must agree to erect a sponsorship banner recognizing the City of Ocala’s support of the program at the recipient’s expense. This banner shall be erected at the facility for the duration of the program/season sponsored. The verbiage of the banner shall be determined by the Recreation and Parks Director.
 - e. Provide the City with whatever benefits are afforded other sponsors of similar sponsorship levels (i.e. sponsor table, etc.).



CITY OF OCALA COMMUNITY SPONSORSHIP APPLICATION



Return Completed Application to:
Recreation & Parks Department
Special Services Division
828 NE 8th Avenue
Ocala, Florida 34470
352-368-5550

The City Council recognizes the importance of providing monetary and other City support for community festivals, parades and celebrations that are held for the general economic benefit of the City's business community, cultural enrichment and/or promotion of the City of Ocala. In order to expand access to a wide range of cultural experiences and community connections for all its residents, the City of Ocala provides limited assistance through fee waivers and cash sponsorships to local organizations in support of community programs. Sponsorships for eligible organizations and programs will be considered upon filing a sponsorship application with the Recreation and Parks Department no less than 45 days and no more than one year before the program date. Please refer to the Community Sponsorship Policy for additional and specific information pertaining to this application.

Please type of print legibly. Incomplete or illegible applications will be returned to the applicant and will not be processed.

Type of Sponsorship:

Fee Waiver Sponsorship Cash Sponsorship – Amount Requested \$ _____

Name of Organization Requesting Sponsorship: _____

Local Address for Organization: _____

Complete Address of Organization's Headquarters (if applicable) Including City, State & Zip Code:

Is this organization a registered Florida not for profit organization? Yes No

Is this organization registered as a non-profit organization for tax purposes? Yes No

Tax Exempt Number: (501 c-3, etc.) _____

Organizations Mission: _____

Name of Program/Event: _____

Program/Event Mission: _____

Program/Event Date(s): _____

Program/Event Time(s): Provide actual event times. If event is more than one day, provide date & times for each day. _____

Expected Number of Participants: _____

CONTINUED ON BACK

Please list all sponsorship **benefits** receiving name/logo recognition, **type of recognition** and **deadline date(s)** for each (i.e. Star Banner-Logo-12/31/09):

_____	_____
_____	_____
_____	_____

Will this program/event be held on City of Ocala property? Yes No

Provide name of business and address where program/event will be held:

Name of Business/Property: _____

Physical Address for Location of Program/Event Including Zip Code:

Will this program charge any admission, gate, parking and/or similar fees? Yes No

If yes, list fee type _____ and amount \$ _____

Will this program be open to the general public? Yes No

How will your organization and the proposed program/event benefit the residents of Ocala and the Ocala Utility Service Area? _____

Will there be vendor/sponsor booths at your program? Yes No (If sponsorship is provided by the City, a sponsorship booth must be provided to the City at no cost where applicable).

How much space is available for set up ___' x ___' Will you provide any of the following:

Tent Tables # ___ Size ___ Table Covering(s) Chairs # ___

Set up start time _____ Set up completion time _____ Breakdown time _____

Name and Contact Information of Individual Responsible for the Completion of this Application:

Name: _____

Mailing Address Including Zip Code: _____

Telephone # _____ Fax #: _____ Email: _____

REQUIRED ATTACHMENTS (indicate which attachments are being provided with application):

Parade App. (if appropriate) Pre-program Financial Affidavit Sponsorship package/info

Current program flyer/poster (previous years if current is not available)

Valid proof of not-for-profit status (must be attached for consideration of fundraising programs).

I have received and read the City of Ocala's Community Sponsorship policy and I agree to adhere to all criteria within this policy. _____ Please initial

I certify that the information contained on this application is true and correct to the best of my knowledge. Printed name & signature of person completing application:

Printed name: _____ Signature: _____ Date: _____



Community Sponsorship Fund Pre-Program Financial Affidavit



Application Information

Pre-Program Financial Affidavits are required for all programs requesting Community Sponsorship Funding & must be received by Recreation & Parks no less than 45 days and no more than 1 year before the program.

Please type or print legibly using black ink.

Incomplete or illegible applications will be returned to the applicant and will not be processed.

Name of the Program: _____

Name of Organization Requesting Sponsorship: _____

Is this a new Program? Yes No If No, how many years has this Program been active? ____

If Yes, do you anticipate this will be an annual Program? Yes No

PROJECTED INCOME & BUDGET INFORMATION

Please attach a budget addendum if necessary but please complete information below.

INCOME		EXPENSES	
Earned Income (Ticket Sales, Retail Sales, Admission Fees, Vendor Fees, etc.)	\$ _____	Administration (Payroll, Postage, Phone, Permits , Photocopying, etc.)	\$ _____
Concessions	\$ _____	Marketing/Public Relations (Advertising, Flyers, Posters, Brochures, etc.)	\$ _____
Grants	\$ _____	Entertainment & Speakers	\$ _____
Sponsors (Pending and/or Confirmed)	\$ _____	Prizes/Souvenirs (Event t-shirts, hats, giveaways, etc.)	\$ _____
Other (Please Define)	\$ _____	Operations (Facility use charge, cleaning, port-a-lets, sound, judges, security, etc. – excluding any city services)	\$ _____
_____		Food (Catering costs, meals, supplies, delivery charges, etc.)	\$ _____
Subtotal	\$ _____	Other (Please Define)	\$ _____
Sponsorship Requested from City	\$ _____	_____	
Cash Sponsorship	\$ _____	Total	\$ _____
Total Income	\$ _____		

If this financial affidavit indicates a deficit (expenses exceed revenue), explain how the deficit will be handled and why you are operating the program at a deficit: _____

(CONTINUED ON BACK)

ADDITIONAL EVENT INFORMATION

Has this Program previously received City of Ocala Sponsorship Funding? Yes No

If yes, in what year(s) _____

Will you be making a cash donation to an organization from proceeds from this Program?

Yes No If yes, to whom: _____

How many years has the main event director been directing this event? _____

How many years has the main event director directed similar events? _____

Please describe other event organization experience: _____

PLEASE READ CAREFULLY & SIGN BELOW

Financial Affidavits received after the designated deadline and/or incomplete affidavits will not be considered. Any program that has not completed a Post-Program Financial Affidavit from the previous year will not be considered for Community Sponsorship Funding.

If support is allocated to this program, I agree to follow all polices and guidelines. Pre-Program Financial Affidavits are required for all programs requesting Community Sponsorship Funding and must be received by Recreation & Parks no less than forty-five (45) days and no more than one year before the program. Upon completion of the program, a Post-Program Financial Affidavit must be submitted to include the actual revenue, expenses and (if applicable) any gift donations. The Post-Program Financial Affidavit must be resubmitted to Recreation & Parks no later than thirty (30) days upon completion of the program. Failure to submit Post-Program Financial Affidavit will prohibit the program from receiving future sponsorships.

I certify that the information contained on this application is true and correct to the best of my knowledge. Printed name & signature of person completing application:

Printed name: _____

Affiliation/Position with Organization requesting sponsorship:

_____ Phone #() _____ - _____

Signature: _____ Date: _____

Return Completed Application to:

Recreation & Parks Department
Special Services Division
828 NE 8th Avenue
Ocala, Florida 34470
352-368-5550

For Office Use Only:

Date Received _____
__ Sponsorship Application
__ Parade Application (if applicable)
__ Routing Form
__ Post Financial



Community Sponsorship Fund Post-Program Financial Affidavit



Application Information

Post-Program Financial Affidavits and Proof of Promotions are required for all programs receiving Community Sponsorship Funding. Upon completion of the program, a Post-Program Financial Affidavit must be submitted to include the actual revenue, expenses and (if applicable) any gift donations. The Post-Program Financial Affidavit must be submitted along with Proof of Promotions to Recreation & Parks no later than thirty (30) days upon completion of the program. Failure to submit required documents will prohibit the program from receiving future sponsorships.

Please type or print legibly using black ink.

Incomplete or illegible applications will be returned to the applicant and will not be processed.

Name of the Program: _____

ACTUAL INCOME & BUDGET INFORMATION			
Please attach a budget addendum if necessary but please complete information below.			
INCOME	EXPENSES		
Earned Income (Ticket Sales, Retail Sales, Admission Fees, Vendor Fees, etc.)	Administration (Payroll, Postage, Phone, Permits , Photocopying, etc.)	\$ _____	\$ _____
Concessions	Marketing/Public Relations (Advertising, Flyers, Posters, Brochures, etc.)	\$ _____	\$ _____
Grants	Entertainment & Speakers	\$ _____	\$ _____
Sponsors (Pending and/or Confirmed)	Prizes/Souvenirs (Event t-shirts, hats, giveaways, etc.)	\$ _____	\$ _____
Other (Please Define) _____	Operations (Facility use charge, cleaning, port-a-lets, sound, judges, security, etc. – excluding any city services)	\$ _____	\$ _____
Subtotal	Food (Catering costs, meals, supplies, delivery charges, etc.)	\$ _____	\$ _____
Sponsorship Requested from City	Other (Please Define) _____	\$ _____	\$ _____
Cash Sponsorship	Total	\$ _____	\$ _____
Total Income		\$ _____	

I certify that the information contained on this application is true and correct to the best of my knowledge.

Printed name & signature of person completing application:

Printed name: _____ Phone #() _____ - _____

Affiliation/Position with Organization requesting sponsorship: _____

Signature: _____ Date: _____

Return Completed Affidavit & Proof of Promotions to:
 Recreation & Parks Department, Special Services Division
 828 NE 8th Avenue
 Ocala, Florida 34470
 352-368-5550

For Office Use Only:
 Date Received _____
 ___ Proof of Promotions Received