



MEMO

Finance

To: Common Council
From: Finance Director
Date: 9/5/2023
Re: Donation Request Process

I am writing to propose the establishment of a formal donation request process for the City of Kaukauna. As part of our ongoing commitment to support community initiatives, it is crucial that we streamline and standardize the way we consider and allocate resources for donation requests. This process will not only help in managing our budget effectively but also ensure fairness and transparency in evaluating and approving the various requests that come to the city.

Background:

The City of Kaukauna receives numerous donation requests from various organizations, groups, and individuals seeking support for a wide range of causes, events, and projects. While we have shown dedication to contributing to the betterment of our community, the lack of a structured process often results in inconsistent decision-making and difficulties in allocating resources appropriately.

Proposal:

I recommend the implementation of a Donation Request Process, which will enable us to effectively manage, evaluate, and respond to the donation requests we receive. The primary goal of this process is to ensure that our contributions align with the city's strategic objectives while being mindful of our budget constraints.

Components of the Donation Request Process:

Request Form: I have created a standardized Donation Request Form that will serve as the starting point for all donation requests. (See attached form) This form will collect essential information such as the purpose of the request, the intended impact on the community, the requested amount, and other pertinent details.

Submission Guidelines:

We have a few options on when we want to see the requests submitted. Two options I think can work are listed below.

Option 1: Have an annual submission deadline of September 30. All submissions get reviewed by staff for completeness and then passed along to council for review. Council then approves the request to be placed into that upcoming year budget.

Option 2: Budget a set amount each year. Allow request to be submitted throughout the year for approval by council. The council can make the decision to approve request up to the budgeted amount.

Approval Process:

Depending on how many requests the council want to see there are again a couple options I think can work listed below.

Option 1: If option 1 from above is selected then have all requests come to the council for review and approval.

Option 2: Give the mayor authorization to approve up to a defined request amount. Requests exceeding a certain threshold require approval from the City Council.

Report Back: Requests exceeding \$1,000 must be brought back to the council within sixty (60) days after the successful conclusion of the event. Similarly, requests surpassing \$5,000 should include financial details of the event. Recipients are required to submit a report to the staff, which will then be included in the council's agenda for informational purposes.

Website Posting: I envision this process/procedure living on the city website. The page can explain our process while providing access to the submission form. It can also be a place where we showcase the current or previous year recipients of the donation.

Benefits:

Effective Resource Management: A structured process will enable us to allocate our resources more efficiently and avoid ad-hoc decisions.

Strategic Alignment: We can ensure that our contributions are in line with the city's goals and objectives, making a meaningful impact on the community.

Fairness: Standardized evaluation criteria will promote fairness and consistency in decision-making.

Transparency: By communicating decisions to applicants, we promote transparency and maintain positive relationships with community stakeholders.

The establishment of a Donation Request Process will enhance our ability to support valuable community initiatives while maintaining fiscal responsibility. With that I am seeking consideration and support for the implementation of this process and form in some fashion.

Donation Request Submission Form



Organization Name: _____ Date of Request: _____

Contact Person: _____

Contact Email: _____ Contact Phone Number: _____

Donation Details:

Purpose of Donation: _____

Amount Requested: _____

Has this donation been previously requested? (Yes/No)

Organization Information:

Organization's Mission or Cause: _____

Brief Description of Organization: _____

How will the donation be utilized (Itemize the expenses)?

Event Information (if applicable):

Event Name: _____ Date of Event: _____

Location: _____

Brief Description of Event: _____

Additional Information (Optional): _____

- ☐ By checking this box, recipient agrees to report back to City staff and council on the event success. Any donation request over \$5,000 will requires the update to include the financials of the event.

Internal Use Only

Estimated cost to city operations (Police, Fire, DPW, etc.) _____
(Staff time and other known expenses)

Is this donation funded by the budget ? (Yes / No)

What account will fund this donation? _____

Approvals/Recommendations

Recommended by Mayor _____ *Date:* _____

Date spending approved by Council _____