



CITY OF NANAIMO APPLICATION FOR PERMISSIVE TAX EXEMPTION

Office Use

ORGANIZATION:	DATE:	
ADDRESS:	PRESIDENT:	
	SENIOR STAFF MEMBER:	
	POSITION:	
	CONTACT:	
TELEPHONE:	TELEPHONE:	
OVERVIEW OF YOUR ORGANIZATION'S PROGRAMS AND SERVICES OFFERED IN THE COMMUNITY:		
GEOGRAPHIC AREA SERVED BY THE ORGANIZATION:		
NO. OF FULL TIME STAFF:	NO. OF PART TIME STAFF:	
NO. OF COMMUNITY VOLUNTEERS:	NO. OF VOLUNTEER HOURS PER YEAR:	
NO. OF MEMBERS:	MEMBERSHIP FEE:	
CLIENTS SERVED, LAST YEAR:	CLIENTS SERVED, THIS YEAR (PROJECTED):	
B.C. SOCIETY ACT REG. NO.:	REVENUE CANADA CHARITABLE REG. NO.:	
CURRENT BUDGET:	LEGAL DESCRIPTION OF PROPERTY:	
INCOME		
EXPENSES:	TAX FOLIO NUMBER:	
NEXT YEAR PROJECTED:		
INCOME:	CURRENT YEAR TAXES (IF KNOWN):	
EXPENSES:		
SIGNATURE:	TITLE/POSITION:	DATE:

NOTE: YOUR ORGANIZATION'S MOST RECENT AUDITED FINANCIAL STATEMENTS AND CURRENT FINANCIAL STATEMENTS MUST BE ATTACHED TO THE APPLICATION FORM (INCLUDING A BALANCE SHEET AND INCOME STATEMENT).

CITY OF NANAIMO GRANT QUESTIONNAIRE

1. Please describe the work of your organization in this community.

2. What are your organization's specific priorities for the coming year?

3. How does your organization ensure that it's services address continuing and emerging community needs?

4. Please describe the role of volunteers in your organization.

5. Please list grants applied for/received from other governments or service clubs.

CITY OF NANAIMO GRANT QUESTIONNAIRE

6. Please provide details of fees for service in your organization, and how costs and fees are determined.

7. If your organization is a branch of a larger organization, please indicate how this affects the financial and other information you have provided.

8. Please describe your policy and treatment of: capital, reserve or special purpose funds, and year-end surpluses or deficits.

9. Please describe current or planned approaches to self generated income.

10. What will the effect be if you do not receive a Grant in Aid from the City of Nanaimo?

11. Does your organization require funding to cover the current year's taxes? If so, what amount?

CITY OF NANAIMO

APPLICATION FOR PERMISSIVE TAX EXEMPTION

Division 7 of the *Community Charter* permits Council to exempt from taxation, property used for certain purposes. Organizations that are successful in receiving a Permissive Taxation Exemption will be exempt from taxes in the following and subsequent years. If an organization requires assistance to pay its property taxes in the current year, it should apply for a PTE Cash Grant by filling out question 11 at the end of this application.

Applications for Permissive Taxation Exemptions are first examined to determine whether they meet the requirements of the *Charter*. If they do not, they must be rejected by the Grants Advisory Committee. If the application meets the requirements, the Committee will then evaluate the application on the basis of financial need, appropriateness and service provided to the local community. Applicants may be required to appear before the Committee to answer questions with respect to program services, finances or other issues.

In preparation of your application, you are encouraged to submit any appendices that you feel would add to the understanding of your service. Please complete all attached forms even if you are submitting separate attachments. Ensure all questions on the application are completed or the application will be returned. Please type or print clearly.

Please return applications to the Grants Advisory Committee, c/o Laura Mercer, Finance Department, City of Nanaimo, 455 Wallace Street, Nanaimo, B.C., V9R 5J6. If you require further information or have any questions regarding the application, please call Ms. Mercer at 755-4413. Applications received after August 1 cannot be placed on the Permissive Taxation Exemption Bylaw for the next taxation year.

The following attachments are also required for consideration:

1. Copy of most recent Society Act Annual Report (Form 11)
2. Most recent Audited Financial Statement (or year-end financial statements)
3. Year-to-date Financial Statements
4. Current Year Budget (income and expenditure) or Year-to-Date Statement
5. Proposed Next Year's Budget
6. List of Directors