

## **Business Development Incentives**

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Date Issued: May 14, 2019 – R95-19

Mandated by: Council

Current Revision: February 23, 2021 –  
R40-21

Cross Reference:  
• FIN-014-A Business Development  
Incentives Procedure

Next Review: January 1, 2022

Responsibility: City Manager

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### **1. PURPOSE**

1.1 To provide, in an impartial manner, Incentives for eligible City based businesses and non-residential property owners to encourage them to invest in their business and/or property.

### **2. POLICY**

2.1 The City may, subject to budget approval and available funds, provide reimbursement-based Incentives to encourage investment in Resident Businesses that:

- a) maintains a permanent physical location within the City;
- b) maintains a valid Business Licence; and
- c) aligns with the Guiding Principles of this Policy.

### **3. DEFINITIONS**

3.1 Applicant – means the individual, organization, or business submitting an application for financial support through a Business Development Incentive Program.

3.2 Business – means:

- (a) a commercial, merchandising, or industrial activity or undertaking;
- (b) a profession, trade, occupation, calling, or employment; or
- (c) an activity providing goods or services

whether or not for profit and however organized or formed, including a co-operative or association of persons.

3.3 Business Licence – means a licence issued pursuant to the City's Business Licence Bylaw.

3.4 City – means the City of Fort Saskatchewan.

- 3.5 City Manager – means the Chief Administrative Officer for the City.
- 3.6 Community Wealth – means economic well-being of the community; including adequate opportunities for skilled employment, environmental stewardship, economic stability and growth, expansion of public service by strengthening of the municipal tax-base, and reduction of economic leakage.
- 3.7 Incentives – means a financial contribution where Eligibility Criteria and/or conditions are compulsory for the recipient, and there is a formal application/selection process and a future obligation is attached.
- 3.8 Individual Units – means a contained business with direct physical street-front access. Does not include businesses with street-front access through a shared entrance, common area, lobby, elevator, stairway, etc.
- 3.9 Local Business – means a Business that has a valid Resident Business Licence issued pursuant to the City's Business Licence Bylaw.
- 3.10 Multi-Unit Buildings – means a single building with multiple adjoining Individual Units.
- 3.11 Non-Resident Business – means a business which operates, in whole or in part, within the City's corporate limits, but which does not maintain a permanent business premises within the City's corporate limits.
- 3.12 Personal Use – means assets, equipment, initiatives, and/or property that is used for a purpose other than to directly benefit the business.
- 3.13 Program – means the business development incentives, which is a set of Incentives that establishes clearly defined objectives, terms, conditions, provisions, and eligibility criteria for a recipient to have access to public funds through an objective assessment and selection process.
- 3.14 Program Agreement – means a legal instrument documenting the terms and conditions under which an applicant receives public funds through the Program.
- 3.15 Program Review Officer – means a staff member representing the Economic Development Department on the Review Committee.
- 3.16 Resident Business – means a business that maintains a permanent business premises within the City's corporate limits.
- 3.17 Review Committee – means a committee selected by the City Manager with responsibility for evaluating applications received under this Policy. The Review Committee makes recommendations regarding the Program.

#### **4. GUIDING PRINCIPLES**

- 4.1 Funds available for Incentives are allocated annually through the Economic Development Department's budget approved by Council, or from other sources identified by the City Manager.
- 4.2 Council may choose to eliminate any or all of the Incentives at any time.

- 4.3 The provision of Incentives are based on objective evaluation of applications submitted by local business and/or property owners.
- 4.4 Applications are considered based on the scope and nature of the project, and will be evaluated on their ability to achieve any or all of the following objectives:
- a) significant Community Wealth creation;
  - b) creation of skilled, full-time employment opportunities;
  - c) significant property improvements/intensification/beautification;
  - d) development of new products/services;
  - e) improvements in competitiveness, efficiency, and/or productivity;
  - f) contribution to overall economic well-being and stability of the City;
  - g) economic diversification, including access to new markets; and/or
  - h) reduces economic leakage.
- 4.5 Applications requesting funding greater than \$1,000 are reviewed by a Review Committee, appointed by the City Manager, and comprised of necessary staff from the following departments:
- a) Economic Development;
  - b) Planning and Development;
  - c) Financial Services;
  - d) Legislative Services; and
  - e) Any other department representation deemed necessary.
- 4.6 Applications requesting funding of \$1,000 or less are reviewed by the Program Review Officer.
- 4.7 Incentives are available to Resident Businesses. Non-Resident Businesses may be considered for funding for projects that benefit a local business and align with the intent and objectives of the Program.
- 4.8 Eligible projects must be within the municipal boundaries of the City.
- 4.9 Incentives will only be provided for assets, equipment, initiatives, and property that are exclusively for the operation of the business, and not for Personal Use or benefit.
- 4.10 The maximum amount available under each Incentive is as follows:
- a) \$500 per application for the Small Business Education Incentive
  - b) \$5,000 per application for the Equipment and Technology Incentive
  - c) \$5,000 per application for the Small Business Marketing Incentive
  - d) \$10,000 per application for the Storefront Improvement Incentive.
  - i. In the case of Multi-Unit Buildings, the maximum amount available is \$10,000 per application per Individual Unit, and is not to exceed \$30,000 in total for the entire building.
  - e) \$5,000 per application for the Export Development Incentive.

- 4.11 All efforts shall be taken to reduce risk to the City. These efforts include but are not limited to:
- a) successful Applicants will be required to enter into, and abide by, a binding Program Agreement;
  - b) Incentives will only be provided as a reimbursement at the completion of the project, and only after the Applicant has submitted sufficient documentation to verify that all of the conditions of the funding have been met to the satisfaction of the Review Committee;
  - c) Incentives require matching funds to be provided by the Applicant, and are subject to the following limitations:
    - i) Will not exceed 65% of eligible costs/expenses for goods and services supplied by a Local Business; and
    - ii) Will not exceed 50% of eligible costs/expenses for goods and services supplied by a non-Local Business; and
    - iii) Will not exceed the maximum of the Incentive allocations.
  - d) Applicants must demonstrate, to the satisfaction of the Program Review Officer/Review Committee, that they have the resources necessary to complete the project/initiative as outlined in the application.
  - e) Applicants who are found to be in violation of a Program Agreement may be prohibited from applying for any Program for a period of 10 years.
- 4.12 Every effort shall be taken to maintain transparency and integrity of the Program. These efforts include but are not limited to:
- a) records of decisions and discussions of the Program Review Officer/Review Committee to be maintained; and
  - b) information on Incentives awarded will be published on the City's website and reported in the tri-annual financial report. This information may include details such as:
    - i. amount of Incentive approved;
    - ii. recipient of the Incentive;
    - iii. total estimated project cost;
    - iv. nature and scope of the project;
    - v. expected impacts/benefits to the community; and
    - vi. actual amount of Incentive provided at project completion.
- 4.13 Projects and initiatives that involve property and/or building improvements, must adhere to all applicable requirements of the land-use bylaw, and codes/standards to be eligible for reimbursement.

## 5. AUTHORITY / RESPONSIBILITY TO IMPLEMENT

- 5.1 The City Manager is authorized to establish procedures for the implementation of this Policy which are consistent with the Guiding Principles.

## **Business Development Incentives**

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Date Issued: June 7, 2019

Responsibility: City Manager

Current Revision: November 23, 2021

Cross Reference:

- FIN-014-C Business Development Incentives Policy
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### **1. PURPOSE**

- 1.1. To set out the process to review, approve, and administer the Program, as referenced in FIN-014-C Business Development Incentives Policy.

### **2. DEFINITIONS**

- 2.1. Applicant – means the individual, organization, or business submitting an application for a Business Development Incentive.
- 2.2. Application Date – means the date in which the application was acknowledged as received by the Program Review Officer.
- 2.3. Asset – means a single piece of equipment, several components which form a technology or system, application, software and/or software licensing.
- 2.4. Business – means:
  - (a) a commercial, merchandising, or industrial activity or undertaking;
  - (b) a profession, trade, occupation, calling, or employment; or
  - (c) an activity providing goods or serviceswhether or not for profit and however organized or formed, including a co-operative or association of persons.
- 2.5. Business Licence – means a licence issued pursuant to the City's Business Licence Bylaw.
- 2.6. City – means the City of Fort Saskatchewan.
- 2.7. Council – means the municipal Council for the City of Fort Saskatchewan.
- 2.8. City Manager – means the Chief Administrative Officer for the City.
- 2.9. Commercial Property – means Property identified for commercial uses as defined the City's Land-Use Bylaw.

- 2.10. Community Wealth – means economic well-being of the community; including skilled employment opportunities, environmental stewardship, economic stability and growth, expansion of public service by strengthening of the municipal tax-base, and reduction of economic leakage.
- 2.11. Completion Date – means the date which all work on the proposed project must be completed to the satisfaction of the Review Committee.
- 2.12. Eligibility Criteria – means terms that specify who qualifies to receive support through the Program and/or the actions necessary to qualify for the Incentives prior to receipt of funds.
- 2.13. Eligible Expense – means those expenses related to an approved project as outlined in the Program Agreement.
- 2.14. Greenfield Development – means development on land or Property that did not have previous development, and that does not follow prior work completed on site. It does not require demolition or renovation of existing structures or facilities.
- 2.15. Incentives – means a financial contribution where Eligibility Criteria and/or conditions are compulsory for the recipient, and there is a formal application/selection process and a future obligation is attached.
- 2.16. Individual Unit – means a contained commercial or industrial business with direct physical street front access. Does not include contained commercial or industrial businesses with street front access through a shared entrance, common area, lobby, elevator, stairwell, etc.
- 2.17. Industrial Property – means Property identified for industrial uses as defined in the City's Land-Use Bylaw.
- 2.18. Local Business – means a Business that has a valid Resident Business Licence issued pursuant to the City's Business Licence Bylaw.
- 2.19. Multi-Unit Building – means a single building with multiple adjoining Individual Units.
- 2.20. Non-Resident Business – means a business not based within the municipal boundaries.
- 2.21. Program – means the business development incentives, which is a set of Incentives that establishes clearly defined objectives, terms, conditions, provisions, and Eligibility Criteria for a recipient to have access to public funds through an objective assessment and selection process.
- 2.22. Program Agreement – means a legal instrument documenting the terms and conditions under which an Applicant receives public funds through the Program.
- 2.23. Program Review Officer – means a staff member representing the Economic Development Department on the Review Committee.
- 2.24. Project Inspection – means the periodic inspection by the Project Review Officer and/or appropriate City staff to determine an Applicant's qualification for the Program, review project progress, and to evaluate the completed project with respect to the Program Agreement.

- 2.25. Property – means a parcel of land described in a Certificate of Title and contained within defined lot lines.
- 2.26. Resident Business – means a business based within the municipal boundaries.
- 2.27. Review Committee – means a committee selected by the City Manager with responsibility for evaluating applications received under this Procedure. The Review Committee makes recommendations regarding the Incentives.
- 2.28. Small Business – means a for-profit business with less than 50 employees.
- 2.29. Storefront – means the portion of the Property or building that enables direct physical and visual contact between the street and/or pedestrian zone and the interior of the building.

### **3. PROCEDURE**

#### **3.1 GUIDING PRINCIPLES**

- 3.1.1 Applicants for Program must demonstrate how their application will contribute to the overall economic well-being of the City and generate Community Wealth.
- 3.1.2 Incentives are funded annually through Non-Resident Business Licence revenue and allocated annually through the Economic Development Department's budget, approved by Council, or from other sources identified by the City Manager.
- 3.1.3 In no way shall Incentives received from the City be seen as an endorsement of products, services, or ideas of any Applicant.
- 3.1.4 Applications are reviewed in an impartial manner by a Review Committee, which will be selected by the City Manager, comprising of necessary staff from each of the following departments: Economic Development, Planning & Development, Financial Services, Legislative Services, and other department representation as deemed necessary.
- 3.1.5 Incentives are available to Resident Businesses. Non-Resident Businesses may be considered for funding for projects that benefit a local business and align with the intent and objectives of the Business Development Incentives Policy.
- 3.1.6 Applicants are required to possess a valid Business Licence.
- 3.1.7 Incentives will be provided as a reimbursement for a portion of Eligible Expenses at the completion of the project, and only if all of the Eligibility Criteria have been met.
- 3.1.8 Applicants who receive an Incentive will be published on the City's website and published in the tri-annual financial report, at minimum of once per calendar year.
- 3.1.9 Applicants may, at the request of the Review Committee, be required to demonstrate that they possess the resources necessary to complete the project as outlined.
- 3.1.10 Applicants must be in good standing with the City and not be in arrears on taxes, utilities, fees, fines, or other amounts.

- 3.1.11 Applicants found to have falsified documents and/or reports, or submit information that is false or misleading, shall immediately reimburse the City any funds received from an Incentive.
- 3.1.12 The City Manager may make minor exceptions to the Business Development Incentive Program Procedures in consultation with the Review Committee, within the Policy mandated by Council.

### **3.2 RESPONSIBILITIES**

- 3.2.1 The City Manager or designate shall:
- a) select members of the Review Committee;
  - b) approve, within signing authority, Program Agreements between the City and recipient;
  - c) identify sources of funds; and
  - d) establish program period, during which applications can be submitted.
- 3.2.2 The Review Committee shall:
- a) review and evaluate applications with funding requests of more than \$1,000 in an objective manner;
  - b) seek additional information when necessary to make an informed decision on an application;
  - c) establish the terms of the Program Agreements;
  - d) provide additional definition and interpretation of the boundaries and terms of the Incentives as required;
  - e) recommend annual changes to these Procedures to the City Manager;
  - f) evaluate the Incentives annually and make recommendations to the City Manager regarding their continuation, cessation, and/or ongoing implementation; and
  - g) meet every 2 months or as needed.
- 3.2.3 The Program Review Officer shall:
- a) serve as the City's primary contact for receipt of applications;
  - b) evaluate applications for completeness;
  - c) review and evaluate applications with funding requests of \$1,000 or less in an objective manner;

- d) prepare reports on applications to the Review Committee;
- e) maintain records of decisions and discussions of the Review Committee;
- f) prepare appropriate schedules and documentation pursuant to the Program Procedures and Policy; and
- g) conduct Project Inspections of the project as necessary.

3.2.4 The Applicant shall:

- a) provide all documentation required by the application, and requested by the Review Committee;
- b) adhere to the stipulations and conditions of the Program Agreement;
- c) obtain all necessary permits and licences;
- d) provide all necessary reports and documentation at the conclusion of the project;
- e) ensure the project is complete by the Completion Date stated within the Project Agreement;
- f) ensure general upkeep and maintenance of the Property pursuant to the City's Community Standards Bylaw; and
- g) not submit documentation that is false, incomplete, incorrect or misleading.

**3.3 APPLICATION REVIEW**

- 3.3.1 All completed applications are reviewed and evaluated. Funding requests of \$1,000 or more are reviewed by the Review Committee. Funding requests of less than \$1,000 are reviewed by the Program Review Officer.
- 3.3.2 The Review Committee meets every 2 months or as required.
- 3.3.3 The Review Committee or Program Review Officer will recommend to the City Manager approval, modification, or refusal regarding the decision to enter into a Program Agreement regarding any application.
- 3.3.4 The Review Committee or the Program Review Officer will determine whether an application is in compliance with the Policy and Procedure.
- 3.3.5 The Review Committee or the Program Review Officer will determine the eligibility of costs/expenses, and the allocation of funds depending on the nature and scope of the project, relative to the Policy and Procedure.
- 3.3.6 The Review Committee or the Program Review Officer may, at their discretion, allocate funding that is less than the requested amount, depending on the nature and scope of the project.

- 3.3.7 Approvals are based on Eligibility Criteria and how well applications align with the Policy and Procedure.
- 3.3.8 There is no method of appeal for the decision of the Review Committee or the Program Review Officer.

### 3.4 MUNICIPAL CONTROL

- 3.4.1 Council may choose to eliminate any of the Incentives at any time.
- 3.4.2 The delivery of Incentive funding is subject to the terms of the Program Agreement.
- 3.4.3 Submitting an application does not commit the City to enter into a Program Agreement.
- 3.4.4 The acceptance of an application does not constitute approval, or that a Program Agreement will actually be entered into by the City.
- 3.4.5 The Program period during which applications can be submitted is at the discretion of the City Manager or their designate.

### 3.5 INCENTIVE GUIDELINES

#### 3.5.1 SMALL BUSINESS EDUCATION INCENTIVE

##### a) PURPOSE

- i. The purpose of this Incentive is to encourage Resident Small Business owners to develop additional entrepreneurship skills and knowledge through educational programs, courses, seminars, conferences, or workshops.

##### b) ELIGIBILITY

- i. The Applicant must meet the following minimum requirements to be eligible to apply for the Small Business Education Incentive:
  - 1. must be a Resident Business within the City;
  - 2. must possess a valid Business Licence; and
  - 3. Applicant must be the owner of a Small Business.
- ii. Applicants, Property, or businesses that have received funds through the Small Business Education Incentive within the previous 3 years will not be eligible.

##### c) ELIGIBLE ASSISTANCE

- i. Maximum funding allowed under the Small Business Education Incentive is as follows:
  - 1. not to exceed 65% of eligible costs for goods and services supplied by a Local Business; and

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2. Not to exceed 50% of eligible costs for goods and services supplied by a non-Local Business; and
  3. Not to exceed \$500 per application.
- ii. Amount of funds are allocated at the discretion of the Program Review Officer based on the maximum amount under the program, available funds, and the scope and nature of the project.
  - iii. Eligible activities include, but are not limited to, participation in:
    1. programs;
    2. courses;
    3. seminars;
    4. webinars;
    5. conferences; and/or
    6. workshops.
  - iv. Eligible costs include:
    1. registration/tuition fees; and/or
    2. course related text books and/or manuals.
  - v. Ineligible costs include but are not limited to:
    1. travel and accommodation;
    2. salaries;
    3. operational costs;
    4. hosting and/or hospitality;
    5. food and beverage;
    6. printing fees;
    7. internet fees; and/or
    8. personal equipment/materials.
- d) APPLICATION REQUIREMENTS
- i. Applications submitted under the Small Business Education Incentive must include the following components:
    1. a completed application form;
    2. detailed description of the educational activity to be undertaken, including course syllabus (if applicable), educational topic, program duration, completion requirements, diplomas or certificates to be awarded upon completion, etc;
    3. detailed program costing; and
    4. detailed description of how participation in the educational activity will support the Applicant and their business.
- e) APPLICATION PROCESS
- i. Applicants are encouraged to consult with the Program Review Officer, or the Economic Development Department, prior to submitting an application.

- ii. Completed applications will be submitted to the Program Review Officer.
  - iii. The Program Review Officer will acknowledge receipt of the application and the Application Date.
  - iv. Costs related to an educational program that are incurred prior to the Application Date will not be eligible for the Incentive.
  - v. Costs related to an educational program incurred after the Application Date, but before the Program Agreement is executed may be considered eligible at the discretion of the Program Review Officer.
- f) REIMBURSEMENT OF PROJECT COSTS
- i. City funds will only be provided once relevant documentation and reporting are approved by the Program Review Officer.
  - ii. City funds will only be provided for eligible costs/expenses as identified by the Program Agreement and shall be the lesser of:
    - 1. the allocation approved by the Review Committee or Program Review Officer; or
    - 2. the portion of actual costs/expenses as calculated in accordance with the maximum eligible assistance.
  - iii. City funds will only be provided for the educational activity identified in the Program Agreement, no other costs/expenses will be eligible.
  - iv. Applicants will not be eligible for reimbursement if at the time of completion they are in arrears for taxes, utilities, fines, or other fees owed to the City.
  - v. The Applicant is responsible for payment of all invoices, and costs associated with the activity.

### 3.5.2 EQUIPMENT AND TECHNOLOGY INCENTIVE

- a) PURPOSE
- i. The purpose of this Incentive is to encourage Resident Small Business owners to invest in equipment and technology that will significantly increase the efficiency, productivity, and competitiveness of their business.
- b) ELIGIBILITY
- i. The Applicant must meet the following minimum requirements to be eligible to apply for the Equipment and Technology Incentive:
    - 1. must be a Resident Business within the City;
    - 2. must possess a valid Business Licence;
    - 3. Applicant must be the owner of the business or their legal representative;and

4. Applicant must be a Small Business.
  5. Non-profit groups, charities, religious organizations, or government agencies/departments will not be eligible.
- ii. Applicants, Property, and businesses that have received funds through the Program (excluding the Small Business Education Incentive, and/or the Export Development Incentive) within the previous 3 years will not be eligible.
- c) ELIGIBLE ASSISTANCE
- i. Maximum funding allowed under the Equipment and Technology Incentive is as follows:
    1. Not to exceed 65% of eligible costs for goods and services supplied by a Local Business; and
    2. Not to exceed 50% of eligible costs for goods and services supplied by a non-Local Business; and
    3. Not to exceed \$5,000 per application for a single Asset.
  - ii. Funds are allocated at the discretion of the Review Committee for funding requests of more than \$1,000 or the Program Review Officer for funding requests of \$1,000 or less, based on the maximum amount under the Incentive, available funds, as well as the scope and nature of the project.
  - iii. Eligible Assets that can be funded include, but are not limited to:
    1. automation software or equipment;
    2. existing equipment replacement (where replacement creates efficiencies and/or improves productivity);
    3. computer hardware;
    4. smart inventory control systems;
    5. computer software;
    6. electronic payment and Point-Of-Sale systems; and/or
  - iv. Eligible costs include:
    1. cost to purchase eligible Assets;
    2. licence fees for eligible software (to a maximum of 12 months); and/or
    3. professional installation of Assets.
  - v. Ineligible costs include but are not limited to:
    1. lease or rental costs;
    2. vehicles;
    3. mobile devices;
    4. computers that are not exclusively dedicated to operating a business system;
    5. Assets that may be for personal use; and/or
    6. Assets that were utilized prior to the Application Date.

d) APPLICATION REQUIREMENTS

- i. Applications submitted under the Equipment and Technology Incentive must include the following components:
  - 1. a completed application form;
  - 2. detailed description of the Asset to be acquired;
  - 3. detailed costing including documentation verifying costs/expenses; and
  - 4. detailed description of how the Asset will improve efficiency, productivity, and/or competitiveness.

e) APPLICATION PROCESS

- i. Applicants are encouraged to consult with the Program Review Officer, or the Economic Development Department, prior to submitting an application.
- ii. Completed applications will be submitted to the Program Review Officer.
- iii. The Program Review Officer will acknowledge receipt of the application and the Application Date.
- iv. Costs related to the purchase, licensing, or installation of the Asset incurred prior to the Application Date will not be eligible for the Incentive.
- v. Costs related to the purchase, licensing or installation of the Asset incurred after the Application Date, but before the Program Agreement is executed may be considered eligible at the discretion of the Review Committee or Program Review Officer.

f) REIMBURSEMENT OF PROJECT COSTS

- i. City funds will only be provided once relevant documentation and reporting are received and approved by the Review Committee or Program Review Officer.
- ii. City funds will only be provided for eligible costs/expenses as identified by the Program Agreement and shall be the lesser of:
  - 1. the allocation approved by the Review Committee or Program Review Officer; or
  - 2. the portion of actual costs/expenses as calculated in accordance with the maximum eligible assistance.
- iii. City funds will only be provided for the purpose identified in the Program Agreement, no other costs/expenses will be eligible.
- iv. Applicants will not be eligible for reimbursement if at the time of completion they are in arrears for taxes, utilities, fines, or other fees owed to the City.
- v. The Applicant is responsible for payment of all invoices, and costs associated with the Asset.

- vi. Should the eligible Asset be sold, returned, or otherwise disposed of within 3 years of the Application Date, the Applicant may be required to repay the funding provided.
- vii. Periodic Program Inspections may be conducted by the Program Review Officer for a period of 3 years following the application date to verify that the eligible Asset has not been sold, returned, or otherwise disposed of.

### 3.5.3 SMALL BUSINESS MARKETING INCENTIVE

#### a) PURPOSE

- i. The purpose of this Incentive is to assist Resident Small Businesses improve the quality and effectiveness of their marketing efforts, and to help them reach a broader market.

#### b) ELIGIBILITY

- i. The Applicant must meet the following minimum requirements to be eligible to apply for the Small Business Marketing Incentive:
  - 1. must be a Resident Business within the City;
  - 2. must possess a valid Business Licence;
  - 3. Applicant must be the business owner or their legal representative; and
  - 4. Applicant must be a Small Business.
  - 5. non-profit groups, charities, religious organizations, or government agencies/departments will not be eligible.
- ii. Applicants, Property, and businesses that have received funding through the Program (excluding the Small Business Education Incentive, and/or the Export Development Incentive) within the previous 3 years will not be eligible.

#### c) ELIGIBLE ASSISTANCE

- i. Maximum funding allowed under the Small Business Marketing Incentive is as follows:
  - 1. Not to exceed 65% of eligible costs for goods and services supplied by a Local Business; and
  - 2. Not to exceed 50% of eligible costs for goods and services supplied by a non-Local Business; and
  - 3. Not to exceed \$5,000 per application for an eligible project.
- ii. Funds are allocated at the discretion of the Review Committee for funding requests of more than \$1,000 or the Program Review Officer for funding requests of \$1,000 or less, based on the maximum amount under the program, available funds, as well as the scope and nature of the project.
- iii. Eligible projects and their related costs that can be funded include, but are not limited to:

1. development of a marketing plan;
  2. development of marketing materials and/or advertising for the implementation of a marketing plan or strategic marketing project;
  3. marketing and promotion of online presence;
  4. e-commerce and web development (specific to e-commerce)
    - a. logistics & shipping
    - b. supply chain management
    - c. cyber-security
- iv. Eligible costs include:
1. professional fees related to the development of a marketing plan;
  2. website/mobile site design and development;
  3. setup fees and subscriptions (not to exceed 1-year) to e-commerce service providers;
  4. setup fees and hosting costs (not to exceed 1-year) for websites designed to facilitate e-commerce activities;
  5. setup costs associated with supply chain and shipping/logistics;
  6. graphic design;
  7. filming and film production;
  8. brand development;
  9. manufacturing/production costs associated with marketing materials;
  10. sign production and installation;
  11. advertising costs as part of a marketing plan; and/or
  12. translation of marketing materials.
- v. Ineligible costs include but are not limited to:
1. advertising fees;
  2. sponsorship fees;
  3. website hosting/maintenance fees;
  4. staff salaries;
  5. conference/tradeshows/industry event registrations or related fees;
  6. hospitality, food and/or beverage;
  7. travel and accommodations;
  8. uniforms and corporate apparel/clothing;
  9. postage, telecommunications, and other related office costs including rent/lease expenses; and/or
  10. in-kind labour or materials.
- d) APPLICATION REQUIREMENTS
- i. Applications submitted under the Small Business Marketing Incentive must include the following components:
    1. a completed application form;
    2. detailed description of the project;
    3. for projects related to the development of marketing/advertising materials a detailed marketing plan is required;
    4. detailed costing including documentation verifying costs and expenses; and

5. detailed description of how the project will be utilized by the Applicant and how it will help them reach a broader market.

e) **APPLICATION PROCESS**

- i. Applicants are encouraged to consult with the Program Review Officer, or the Economic Development Department, prior to submitting an application.
- ii. Completed applications will be submitted to the Program Review Officer.
- iii. The Program Review Officer will acknowledge receipt of the application and the Application Date.
- iv. Costs related to the project incurred prior to the Application Date will not be eligible for the Incentive.
- v. Costs related to the project incurred after the Application Date, but before the Program Agreement is executed may be considered eligible at the discretion of the Review Committee or Program Review Officer.

f) **REIMBURSEMENT OF PROJECT COSTS**

- i. City funds will only be provided once relevant documentation and reporting are received by the Project Review Officer and approved by the Review Committee or Program Review Officer.
- ii. City funds will only be provided for eligible costs/expenses as identified by the Program Agreement and shall be the lesser of:
  1. the allocation approved by the Review Committee or Program Review Officer; or
  2. the portion of actual costs/expenses as calculated in accordance with the maximum eligible assistance.
- iii. City funds will only be provided for the purpose identified in the Program Agreement, no other costs/expenses will be eligible.
- iv. Applicants will not be eligible for reimbursement if at the time of completion they are in arrears for taxes, utilities, fines, or other fees owed to the City.
- v. The Applicant is responsible for payment of all invoices, and costs associated with the Asset.

3.5.4 **EXPORT DEVELOPMENT INCENTIVE**

a) **PURPOSE**

- i. The purpose of this Incentive is to assist Resident Small Businesses gain access to international markets for their products and services.

b) ELIGIBILITY

- i. The Applicant must meet the following minimum requirements to be eligible to apply for the Export Development Incentive:
  1. must be a Resident Business within the City;
  2. must possess a valid Business Licence;
  3. Applicant must be the business owner or their legal representative; and
  4. Applicant must be a Small Business.
  5. non-profit groups, charities, religious organizations, or government agencies/departments will not be eligible.
  6. Applicant must be participating in an export related event recognized by the provincial or federal government or approved for support from a provincial or federal government export development related program.
- ii. Applicants, Property, and businesses are eligible to receive no more than 3 Export Development Incentives within a 5 year period.

c) ELIGIBLE ASSISTANCE

- i. Maximum funding allowed under the Export Development Incentive is as follows:
  1. Not to exceed 65% of eligible costs for goods and services supplied by a Local Business; and
  2. Not to exceed 50% of eligible costs for goods and services supplied by a non-Local Business; and
  3. Not to exceed \$5,000 per application for an eligible project.
- ii. Funds can be combined with other funding sources and from other levels of government.
- iii. Funds are allocated at the discretion of the Review Committee for funding requests of more than \$1,000, or the Program Review Officer for funding requests of \$1,000 or less, based on the maximum amount under the program, available funds, as well as the scope and nature of the project.
- iv. Eligible projects and their related costs that can be funded include, but are not limited to:
  1. outbound international business travel;
  2. attendance at export related events and tradeshows; and/or
  3. interpretive services for marketing materials.
- v. Eligible costs include:
  1. one economy class return airfare with allowance for one checked piece of luggage;
  2. accommodation in a standard room not to exceed \$300 per person per night;
  3. public ground transportation;
  4. registration fees for export related tradeshows and events;

5. translation services for marketing materials; and/or
  6. postage, shipping and handling fees for promotional materials and displays.
- vi. Ineligible costs include but are not limited to:
1. advertising fees;
  2. sponsorship fees;
  3. staff salaries;
  4. hospitality, entertainment, food and/or beverage;
  5. personal travel and accommodations;
  6. uniforms and corporate apparel/clothing;
  7. telecommunications;
  8. administrative fees including excise taxes, duties, and levies;
  9. travel related documents including passports and entry visas; and/or
  10. in-kind labour or materials.

d) **APPLICATION REQUIREMENTS**

- i. Applications submitted under the Export Development Incentive must include the following components:
1. a completed application form;
  2. detailed description of the project;
  3. registration confirmation and detailed description of the export related event, or confirmation of funding from a provincial or federal export development program;
  4. detailed costing including documentation verifying costs and expenses; and
  5. detailed description of how the project will help the applicant reach a broader international market.

e) **APPLICATION PROCESS**

- i. Applicants are encouraged to consult with the Program Review Officer, or the Economic Development Department, prior to submitting an application.
- ii. Completed applications will be submitted to the Program Review Officer.
- iii. The Program Review Officer will acknowledge receipt of the application and the Application Date.
- iv. Costs related to the project incurred prior to the Application Date will not be eligible for the Incentive.
- v. Costs related to the project incurred after the Application Date, but before the Program Agreement is executed may be considered eligible at the discretion of the Review Committee or Program Review Officer.

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- f) REIMBURSEMENT OF PROJECT COSTS
- i. City funds will only be provided once relevant documentation and reporting are received and approved by the Review Committee or Program Review Officer.
  - ii. City funds will only be provided for eligible costs/expenses as identified by the Program Agreement and shall be the lesser of:
    - 1. the allocation approved by the Review Committee or Program Review Officer; or
    - 2. the portion of actual costs/expenses as calculated in accordance with the maximum eligible assistance.
  - iii. City funds will only be provided for the purpose identified in the Program Agreement, no other costs/expenses will be eligible.
  - iv. Applicants will not be eligible for reimbursement if at the time of completion they are in arrears for taxes, utilities, fines, or other fees owed to the City.
  - v. The Applicant is responsible for payment of all invoices, and costs associated with the Asset.

3.5.5 STOREFRONT IMPROVEMENT INCENTIVE

a) PURPOSE

- i. The purpose of this Incentive is to encourage business and property owners to invest in initiatives that enhance the visual aesthetic of their property and adjoining streetscape.

b) ELIGIBILITY

- i. The Applicant must meet the following minimum requirements to be eligible to apply for the Storefront Improvement Incentive:
  - 1. the property must be within the City;
  - 2. must be the owner of the property and/or business, or their legal representative;
  - 3. projects that are part of a Greenfield Development or proposed on land/property that was previously undeveloped will be deemed ineligible;
  - 4. Individual Units within a Multi-Unit Building will be treated as individual Applicants;
  - 5. Properties, businesses and/or Applicants that have received funding through the Program (excluding the Small Business Education Incentive, and/or the Export Development Incentive) within the previous 3 years will be deemed ineligible; and
  - 6. government buildings/property, residential property without a ground-floor commercial use, churches and other religious institutions will not be eligible.

c) ELIGIBLE ASSISTANCE

- i. Maximum funding allowed under the Storefront Improvement Incentive is as follows:
  1. Not to exceed 65% of eligible costs for goods and services supplied by a Local Business; and
  2. Not to exceed 50% of eligible costs for goods and services supplied by a non-Local Business; and
  3. Not to exceed \$10,000 per application.
- ii. Individual Units within a Multi-Unit Building are each eligible for assistance, to a maximum of \$30,000 per Multi-Unit Building within a 3 year period.
- iii. Funds are allocated at the discretion of the Review Committee for funding requests of more than \$1,000, or the Program Review Officer for funding requests of \$1,000 or less, based on the maximum amount under the Program, available funds, as well as the scope and nature of the project.
- iv. Eligible costs include:
  1. architectural and/or engineering fees;
  2. repainting, restoring, or re-facing of facades;
  3. redesign and reconstruction of Storefront;
  4. repair or restoration of Storefront masonry, brickwork, stucco, wood, or other siding material;
  5. replacement of windows;
  6. replacement of cornices, eaves, parapets, and other architectural features;
  7. entrance-way modifications that improve the appearance and or access, including barrier free access for persons with mobility impairments.;
  8. installation of canopies and lighting;
  9. installation of exterior lighting;
  10. professional restoration of historic features;
  11. signage that is part of an overall storefront improvement;
  12. rear or side-facing facades that are part of a larger overall improvement project or that help activate under-utilized spaces; and
  13. curbside enhancements including temporary furniture for the purpose of a sidewalk café or similar setup.
- v. Ineligible costs include but are not limited to:
  1. repairs or restoration to structural foundations;
  2. repairs or restoration to parts of the building unrelated to the Storefront;
  3. roof repairs or restoration not related to exterior aesthetics;
  4. electrical or plumbing work not related to exterior aesthetics;
  5. security bars, security systems, or non-architectural fencing;
  6. non-permanent fixtures or interior window coverings;
  7. personal property or equipment;
  8. interior or exterior artificial plants;
  9. sidewalks and/or paving not associated with improvements;
  10. costs incurred prior to the Application Date; and

11. any improvements required to correct Building Code, Fire Code, or Property Standard orders.

d) APPLICATION REQUIREMENTS

- i. Applications submitted under the Storefront Improvement Incentive must include the following components:
  1. a completed application form;
  2. detailed explanation, written and graphic, of the project to be undertaken and how it reflects the Guiding Principles of the Policy and Procedure;
  3. project costing, detailing eligible expenses the Applicant is seeking support for (if necessary, the Review Committee may request a minimum of 2 quotes to verify project costing);
  4. photographs of the current property/facility and renderings/drawings of the expected results;
  5. current Land Title Certificate and/or a Corporate Registry Search if the property owner is a company;
  6. written permission from the Property owner if the applicant is a tenant of the building;
  7. tenants must provide a copy of their current lease agreement, demonstrating at least 3 years remaining from the Application Date;
  8. an approved development permit and/or approved building permit;
  9. meet all applicable building and safety codes, development requirements and comply with zoning requirements upon completion;
  10. if project is within the Downtown Redevelopment Area, it must adhere to the City's Downtown Area Redevelopment Plan's Design Policies and Guidelines;
  11. projects that propose to modify buildings or property designated under the Alberta Historical Resources Act, or identified as being of historic interest to the City or the Province of Alberta may be subject to additional approvals;
  12. the Review Committee may request additional information to verify that the Applicant possesses the resources to complete the project as outlined (this can include but is not limited to a list of similar projects completed, financial statements, letter of credit, etc.); and
  13. all contractors performing work on the project must be licensed by the Province of Alberta and possess a valid Business Licence issued by the City. They must also carry all required insurances.

e) APPLICATION PROCESS

- i. Applicants are encouraged to consult with the Program Review Officer, or the Economic Development Department, prior to submitting an application.
- ii. Completed applications will be submitted to the Program Review Officer.
- iii. The Program Review Officer will acknowledge receipt of the application and the Application Date.
- iv. Costs related to the project incurred prior to the Application Date will not be eligible for the Incentive.

- v. Costs related to the project incurred after the Application Date, but before the Program Agreement is executed may be considered eligible at the discretion of the Review Committee or Program Review Officer.
  - vi. Prior to approval, the Project Review Officer along with appropriate City staff may conduct an inspection of the property/facility and/or proposed work site to determine the status of the property prior to the project commencing.
- f) REIMBURSEMENT OF PROJECT COSTS
- i. City funds will only be provided once relevant documentation and reporting are received by the Project Review Officer and approved by the Review Committee or Program Review Officer.
  - ii. City funds will only be provided for eligible costs/expenses as identified by the Program Agreement and shall be the lesser of:
    - 1. the allocation approved by the Review Committee or Program Review Officer; or
    - 2. the portion of actual costs/expenses as calculated in accordance with the maximum eligible assistance.
  - iii. City funds will only be provided once all conditions of applicable permits have been satisfied.
  - iv. City funds will only be provided for the purpose identified in the Program Agreement, no other costs/expenses will be eligible.
  - v. Applicants will not be eligible for reimbursement if at the time of completion they are in arrears for taxes, utilities, fines, or other fees owed to the City.
  - vi. The Applicant is responsible for payment of all invoices, and costs associated with the Asset.
  - vii. If the Property owner, as Applicant, should sell or otherwise dispose of the property within 3 years of the Application Date, the City may require that funds provided under the Incentive be reimbursed.