

# Grant Programs Review

**Core Service Review**



# What are we doing now?

Multiple programs across 3 departments

- 1. Community Social Investment Fund**
  - Health & Social Services
- 2. Community Partnership & Development Fund**  
**50/50 Community Project Capital Funding Initiative**
  - Community Services
- 3. Special Events Economic Development Partnership Fund**
  - Economic Development

# What are we doing now? (con't)

- Each have different criteria, application processes, administrative requirements, funding periods etc.
- All address specific needs in the community that are not otherwise funded or available.
- In most cases, without City support the program would not exist or would be reduced in scope.
- All are 100% tax supported.

# Community Social Investment Fund

## What are we doing now?

- Funds community programs or services that address poverty-related issues in the City and County of Haliburton, with a primary focus on supporting children of low income families
- City's funding is \$130,300 (County funds an additional \$43,400)
- Sole source of funding for the majority of the programs / services. Doesn't support existing services.
- All current funding allocations expire Dec. 2015

# CSIF Options

1. Continue CSIF with revised policy – incorporate a Social Return on Investment and Poverty Reduction focus
2. Continue CSIF – with reduced funding
3. Eliminate CSIF program
4. Continue CSIF – with increased funding

# CSIF Option 1 - Description

- Continue the program with revised policy or criteria
  - Include greater focus on Poverty Reduction Strategy recommendations and Social Return on Investment
  - Then proceed with application intake for 2016-17 (option could include funding being administered by a community agency)

# CSIF Option 1 - Benefits

- Potential to increase responsiveness to community needs and increase accountability
- Assists in addressing specific recommendations of the Poverty Reduction Strategy

# CSIF Option 1 - Risks

- The greater focus on Poverty Reduction Strategy and Social Return on Investment may reduce eligibility for some previously funded programs



# CSIF Option 1 - Costs

- Same as current if maintaining existing program allocation
- Existing budget: \$130,300

# CSIF Option 2 - Description

Reduce overall CSIF allocation:

- Could require revised criteria as well or straight reduction in available funding
- Then proceed with application intake for 2016-17 with reduced allocation

# CSIF Option 2 - Benefits

- Cost savings equivalent to reduction

# CSIF Option 2 - Risks

- Impact on quality of life for low income families
- Would reduce overall investment in the community
- Most CSIF programs are not otherwise financially supported – reduces or eliminates opportunity for residents to access these types of services

# CSIF Option 2 - Costs

- Would reduce budget equal to amount of program reductions
  - Example: a 50% reduction in funding would reduce net budget by \$65,150

# CSIF Option 3 - Description

Eliminate CSIF program

# CSIF Option 3 - Benefits

- Direct cost savings of \$130,300

# CSIF Option 3 - Risks

- Impact on quality of life for low income families
- Would reduce overall investment in the community
- As CSIF is the only source of funding for most of these types of programs, there would be reduced opportunity for residents to access these types of services



# CSIF Option 3 - Costs

- Budget decrease of \$130,300

# CSIF Option 4 - Description

Continue CSIF with increased funding:

- Combined with revised criteria, there are a high number of new funding requests as well as opportunities to enhance programs and services
- Then proceed with application intake for 2016-17 with reduced allocation

# CSIF Option 4 - Benefits

- Increased support to community, addressing needs that are otherwise not met
- Increases opportunities to address specific recommendations of the Poverty Reduction Strategy

# CSIF Option 4 - Risks

- Increases the budget

# CSIF Option 4 - Costs

- Budget increases by the allocation increase:
  - an overall increase of \$100,000 increases the tax levy by approximately 0.13%

# CSIF Conclusion

- Report with recommendations will be brought to first meeting in November
- Changes, if any, could be phased in through 2016 to offset immediate impacts

# Community Partnership & Development Fund: Community Services

## What are we doing now?

- Addresses the process for the request and distribution of operating and/or minor capital funds to be used in partnership with local community organizations to provide financial support for such organizations that provide a valuable resource and service to the municipality and its residents.
- Four separate elements – Beautification, Culture, Special Events, and the Municipal Tax Rebate Fund.
- Municipal contribution is \$150,000.
- Sole source of funding for the majority of the programs/services.
- All current funding allocations expire December 2015.

# 50/50 Community Project Capital Funding Initiative: Community Services

## What are we doing now?

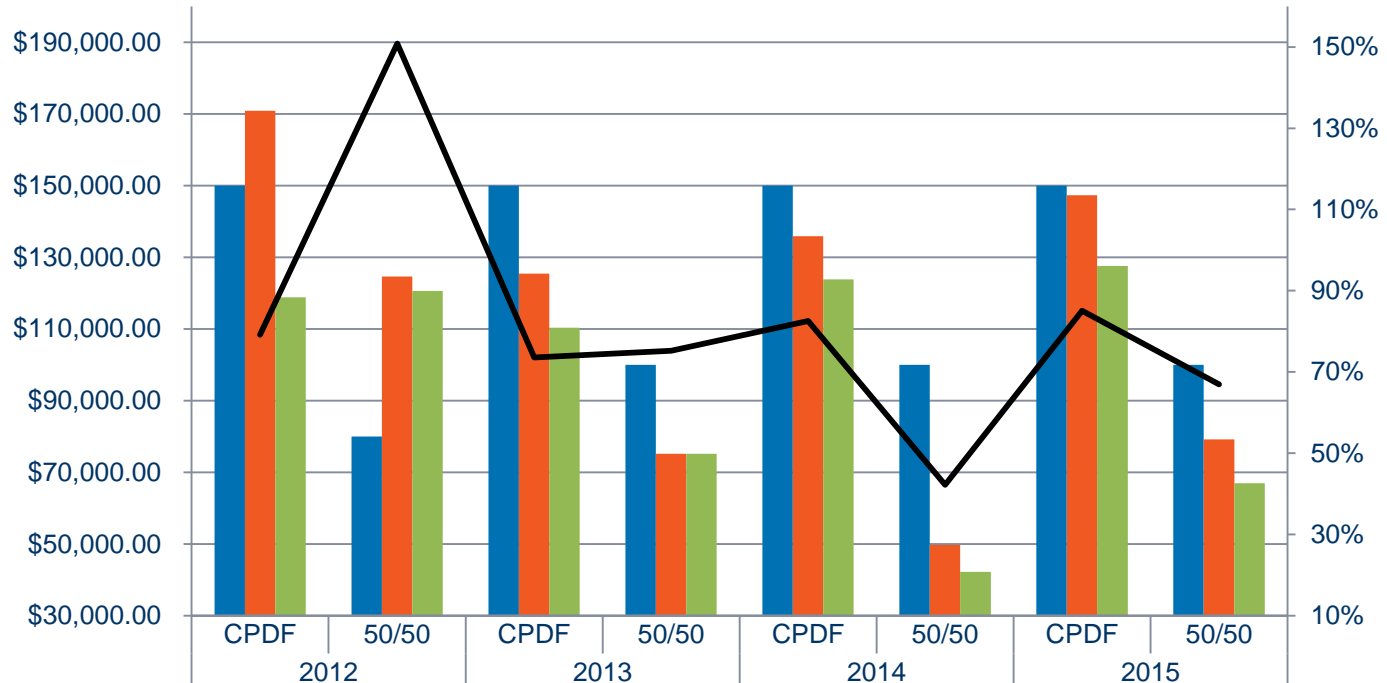
- Addresses the process for the request and distribution of capital funds to be used in partnership with local community organizations to provide for the betterment of the City's facilities and parks.
- "50/50 partnership" is defined as a capital project to be partnered between the City and a local community organization with no greater than 50% of the funds being contributed by the City.
- Municipal contribution is \$100,000.
- Sole source of funding for the majority of the programs/services.
- All current funding allocations expire December 2015.



# Funding Programs

## Community Services (CS)

### Historical Funding



Funding Available	\$150,000	\$80,000	\$150,000	\$100,000	\$150,000	\$100,000	\$150,000	\$100,000
Funds Requested	\$170,861	\$124,610	\$125,425	\$75,221	\$135,855	\$49,715	\$147,285	\$79,242
Funds Recommended	\$118,806	\$120,654	\$110,343	\$75,221	\$123,835	\$42,215	\$127,599	\$66,995
% Allocated	0.79	1.51	0.74	0.75	0.83	0.42	0.85	0.67

# CS Funding Program Options

1. Continue programs with revised policy – based on user group demand
2. Continue programs - with reduced funding
3. Continue programs - with increased funding
4. Eliminate programs

# CS Option 1 - Description

- Continue the program with revised policy or criteria
  - Remove funding categories within the CPDF so that entire funding amount is open to all elements and applicants.
  - Proceed with application intake for 2016-17.

# CS Option 1 - Benefits

- Potential to increase responsiveness to community needs.
- Assists in addressing community and user group requests and demands.

# CS Option 1 - Risks

- One element of funding may consume majority of funding available.

# CS Option 1 - Costs

- Same as current if maintaining existing program allocation
- Existing budget: \$250,000

# CS Option 2 - Description

Reduce overall CS funding allocation:

- Could require revised criteria as well or straight reduction in available funding.
- Proceed with application intake for 2016-17 with reduced allocation.

# CS Option 2 - Benefits

- Cost savings equivalent to reduction.



# CS Option 2 - Risks

- Impact on opportunity to support volunteer organizations and the services they provide.
- Reduction in overall investment in the community and municipal properties and facilities.
- Programs support initiatives that are not otherwise financially supported.
- Some elements have long term agreements associated with them.

# CS Option 2 - Costs

- Would reduce budget equal to amount of program reduction.

# CS Option 3 - Description

- Continue CS programs with increased funding.

# CS Option 3 - Benefits

- Increased support to community, addressing needs that are otherwise not met.

# CS Option 3 - Risks

- Increase to the operating and capital budget.

# CS Option 3 - Costs

- Budget increases by the allocation increase.

# CS Option 4 - Description

- Eliminate CS funding programs.

# CS Option 4 - Benefits

- Direct cost savings of \$250,000.



# CS Option 4 - Risks

- Impact on opportunity to support volunteer organizations and the services they provide.
- Reduction in overall investment in the community and municipal properties and facilities.
- Programs support initiatives that are not otherwise financially supported.
- Some elements have long term agreements associated with them.
- Costs currently covered through program funding would be assumed by the City.

# CS Option 4 - Costs

- Budget decrease of \$250,000.

# CS Funding Conclusion

- Report with recommendations will be brought to upcoming Council November.
- Changes, if any, could be phased in through 2016 to offset immediate impacts.

# Special Events Economic Development Partnership Fund (EDPF)

## The Goals are:

- 1) To encourage and provide **financial support to events that can be proven to have true potential for bringing increased tourist spending into Kawartha Lakes;**
- 2) To promote and enhance the **profile of Kawartha Lakes as a Tourism Destination** through the external marketing and promotion of Special Events hosted within Kawartha Lakes;
- 3) To promote and assist in the development and growth of **self-sustaining** Special Events in Kawartha Lakes;
- 4) To promote and ensure **accountability** of public funds contributed to Special Events; and
- 5) To ensure that municipal contributions to the events are made based upon **reasonable and quantifiable facts** and projections, and not upon assumptions or speculation.

# Background (EDPF)

- Historical Tax Support of \$100,000
- Reduced to Tax Support of \$50,000 in 2013
- 2014 & 2015 EDPF funds reallocated to support Arts, Culture & Heritage Development using
  - \$50,000 EDPF Tax Support
  - \$50,000 from Capital Reserve

EDPF Grant funding of \$35,000 allocated from the Cost Containment Fund(CR2013-1109)

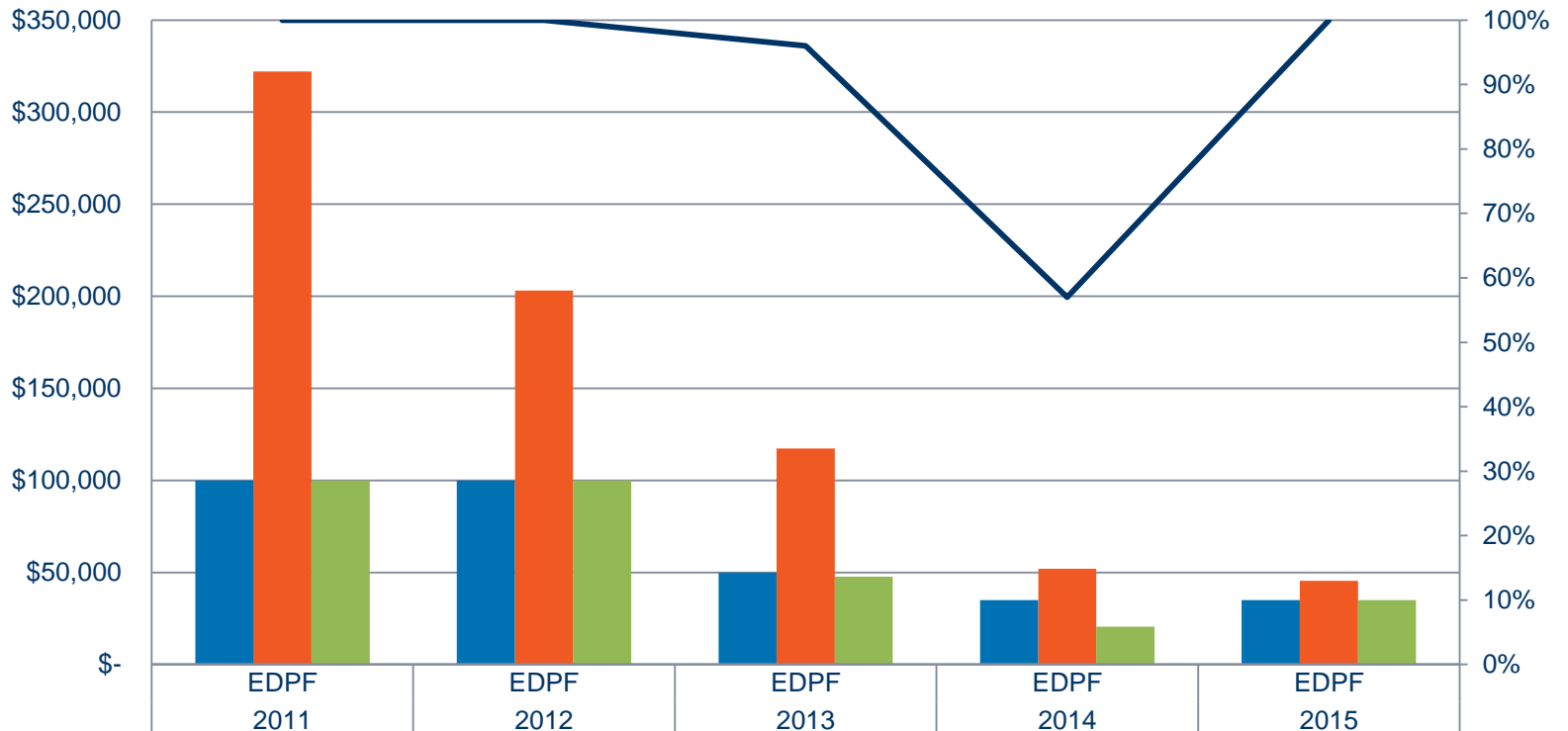
# Special Events Economic Development Partnership Fund (EDPF)

## What are we doing now?

- Funds special events throughout the municipality that attract tourists and non-resident spending to the community.
- Tax Support funding budgeted 2016 is \$35,000
- Only source of grants for the majority of events
- All current funding allocations expire Dec. 2015

# Economic Development Partnership Fund (EDPF)

## Historical Funding



Funding Available	\$100,000	\$100,000	\$50,000	\$35,000	\$35,000
Funds Requested	\$322,020	\$203,060	\$117,355	\$52,000	\$45,504
Funds Granted	\$100,000	\$100,000	\$47,750	\$20,500	\$35,000
% Allocated	100%	100%	96%	57%	100%

# EDPF Options

1. Status Quo
  - 1.a) Continue EDPF with reduced funding
  - 1.b) Continue EDPF with increased funding
2. Move EDPF program to Community Services
  - 2.a) to be managed as a distinguished Tourism Special Event category
  - 2.b) to be managed as a combined grant program within a single pool of funds.
3. Eliminate EDPF program



# EDPF Policy Revisions

As directed by Council the EDPF policy and eligibility criteria will be revised to limit applications to not-for-profit organizations/events.

This will apply for all options presented where EDPF grant program remains in place.

# EDPF Option 1 - Description

- **Status Quo**
  - Proceed with application intake for 2016 with revisions to policy and an intake deadline of March 1, 2016.
- **Status Quo (a) Reduced Funding**
  - Reduce funding from the current \$35,000 and proceed with the policy revisions and an intake deadline of March 1, 2016
- **Status Quo (b) Increased Funding**
  - Increase funding from the current \$35,000 and proceed with the policy revisions and an intake deadline of March 1, 2016

# EDPF Option 1 - Benefits

## Status Quo (with option to increase or decrease)

- Provides financial support to Special Events within Kawartha Lakes
- Encourages Special Events to target their marketing efforts to potential tourists outside our region
- Fosters partnerships between Special Event stakeholders and the City/Economic Development
- Increases awareness of activities available in Kawartha Lakes for tourists

# EDPF Option 1 - Risks

## Status Quo (with option to increase or decrease)

- Limited Applications: The maximum of 3 funding allocations through the EDPF limits the number of Special Events eligible for funding in 2016
- Applicants must be Not-For-Profit organization groups in Kawartha Lakes which have not previously received 3 grant awards from this fund.

# EDPF Option 1 - Costs

## Status Quo (with option to increase or decrease)

- \$35,000 Budgeted for \$2016
- Based on CR2013-1109 should be back to \$50,000 fund allocation
- Significant staff resources required to manage the EDPF program.
  - Intake announcement and marketing of program
  - Application process counseling
  - Extensive review of applications by a minimum of two Economic Development staff
  - Communication with applicants due to incomplete applications
  - Preparation of Council Report with funding recommendations
  - Communication to all applicants on approved funding allocations
  - Accounting documentation for funding allocations
  - Collection and review of post event reports

# EDPF Option 2 - Description

## Move EDPF program to Community Services

### 2.a) Single Grant Program with Tourism Special Event Category

- EDPF funds will be transferred to Community Services to be utilized for the support of Tourism focused Special Events
- Funds will be dedicated specifically and will have a designated category for tourism focused special events
- EDPF guidelines and policy will be revised to be managed by Community Services but will maintain the existing goal of supporting Special Events that aim to attract tourism to the region.

### 2.b) Single Grant Program managed with a single pool of funding

- EDPF funds will be transferred to Community Services and pooled with Community Services grant funding
- Community Services will manage the grant programs utilizing the additional funds provided from the EDPF program
- Special Events with a Tourism focus could apply, but would not have a dedicated category or dedicated funds reserved to assist them specifically

# EDPF Option 2 - Benefits

## Move EDPF program to Community Services

The following benefits apply to both option 2a and 2b:

- More efficient use of staff resources
- Consistency in management of programs and process for applicants
- Special Events will still be able to access funding support from the City through the Community Services program

## 2.a) Single Grant Program with Tourism Special Event Category

- Focus continues on encouraging Special Events to target non-residents in their marketing efforts

## 2.b) Single Grant Program managed with a single pool of funding

- Staff resources required to manage the programs could be reduced further
- Simplified program when specific category requirements are removed

# EDPF Option 2 - Risks

## Move EDPF program to Community Services

### 2.a) Single Grant Program with Tourism Special Event Category

- Less communication between Tourism Development Officer and Special Events stakeholders
- Decrease in partnership development between Tourism Events due to disconnect with the Tourism/Ec Dev Department

### 2.b) Single Grant Program managed with a single pool of funding

- Less funding available for Tourism focused Special Events
- No guidelines requiring events target tourists in their marketing efforts – community based vs. tourism based marketing of events could increase



# EDPF Option 2 - Costs

## Move EDPF program to Community Services

- \$35,000
- Community Services staff resources required to manage the programs (staff resources could be reduced with option 2.b)

# EDPF Option 3 - Description

## Eliminate EDPF

- Remove the EDPF program completely from the Economic Development portfolio
- Special Events in Kawartha Lakes will no longer receive financial support from Economic Development/Tourism
- Special Events will continue to receive in-kind support from Economic Development/Tourism for the development, marketing and initiation of their events
- Special Events could apply for funding through the Community Services grant programs and other tourism event funds (ie. RTO8 partnership fund, Celebrate Ontario, etc.)

# EDPF Option 3 - Benefits

## Eliminate EDPF

- Staff resources required to manage the program can be redirected to other existing and/or new tourism priorities
- Financial savings

# EDPF Option 3 - Risks

## Eliminate EDPF

- Special Events will be limited in available grant funding to support their events
- Provincial Event Funds such as Celebrate Ontario are limited, competitive and may not be an option for some of the Special Events in Kawartha Lakes due to eligibility criteria

# EDPF Option 3 - Costs

## Eliminate EDPF

- Cost savings of \$35,000
- Reduction in staff resources required to manage the program

# Conclusion

- EDPF is an investment in Tourism
- Decline in Special Event funding demand
- Other opportunities for investment with better returns for Tourism Development:
  - Arts, Culture & Heritage Development
  - Other Tourism Product Development