

**STAFF REPORT: Administration**



**REPORT TO:** Finance and Administration  
Committee

**MEETING DATE:** July 26, 2011

**REPORT NO.:** CEDC.11.17

**SUBJECT:** Evaluation Framework for Funding  
Requests

**PREPARED BY:** Lisa Kidd, Communications and  
Economic Development Coordinator

### **A. Recommendation**

THAT Council receive Report CEDC.11.17 "Evaluation Framework For Funding Requests" for information purposes; and

THAT Council approve the Funding Request Framework as outlined herein.

### **B. Background**

In 2008 Council approved implementation of a Grants and Donations Program to streamline the review and decision-making process for funding requests from community groups and business associations in The Blue Mountains.

Through this program Council receives requests from two types of not-for-profit entities:

- Not-for-profit business associations (i.e. Thornbury Business Improvement Area, The Blue Mountains Chamber of Commerce, Clarksburg Business Association, Blue Mountain Village Association)
- Not-for-profit community groups (e.g. the Beaver Valley Agricultural Society, the Canadian Cancer Society, the Girl Guides, the Golden Beavers, etc.)

The current eligibility requirements are as follows:

- Grants are given only to not-for-profit organizations which, in the judgment of the Finance and Administration Committee, make a unique contribution to the quality of life in our community.
- The event or activity for which funding is being sought, must be located in our community, and/or provide benefits for our local residents.
- The request for funding must meet one of the following criteria:
  - Seed Funds;
  - Special Event or Program; or
  - Unique Need.

- Organizations are only eligible for grants provided they demonstrate managerial expertise and good financial management.
- The Committee will give consideration to events and activities which:
  - Exhibit innovation;
  - Include community outreach and education;
  - Help create a sustainable community; and/or
  - Complement the Town's Budget Priorities and Strategic Plan.

Since 2008 Staff and Council have processed requests from both business associations and community groups through the same budget line. However, it has become increasingly challenging to fulfill all eligible requests for a number of reasons:

- The number of requests are increasing;
- The amount of each request is increasing;
- Requests for support of tourism events via business associations are increasing; and
- Business associations and community groups are competing for the same funds.

### **Proposed Evaluation Framework for Funding Requests**

Staff is of the opinion that a new evaluation framework is required to allow for a more effective way to process requests. Staff recommends that a new framework incorporate two streams of funding; the first for community groups and the second for business associations.

Staff proposes the following evaluation framework for funding requests from community groups:

- Every Fall, Staff seeks pre-approval from Council on the grants and donations budget to ensure that funding requests are brought before Council prior to the upcoming calendar year. This will ensure that successful applicants receive funding in a timely fashion.
- Fund operational costs only.
- Request applicant explain how the event/initiative/project aligns with one or more of the following Town endorsed plans:
  - Our Sustainable Path;
  - Red Hot and Blue;
  - Community Improvement Plan; and/or
  - Strategic Plan.
- Fund only not-for-profit organizations which, in the judgment of the Finance and Administration Committee, make a unique contribution to the quality of life in our community.
- Fund only events/ initiatives/ projects located in our community, and/or providing benefits for our local residents.
- Fund only those community groups demonstrating managerial expertise and good financial management.

Staff proposes the following evaluation framework for funding requests from business associations:

- During the budget process, provide each applicant an opportunity to prepare and present a 10-minute deputation to Council, identifying:
  - a business plan;
  - events/initiatives/projects for the calendar year; and
  - amount of request, including financial and in-kind support.
- Request applicant explain how the event/initiative/project aligns with one or more of the following Town endorsed plans:
  - Our Sustainable Path;
  - Red Hot and Blue;
  - Community Improvement Plan; and/or
  - Strategic Plan.
- Fund only not-for-profit business associations which, in the judgment of the Finance and Administration Committee, make a unique contribution to the quality of life in our community.
- Fund only events/initiatives/projects located in our community, and/or providing benefits for our local residents.
- Fund only those business associations demonstrating managerial expertise and good financial management.
- Following the deputation, Council direct Staff to include budget enhancement reports for such requests so that they become part of the budget decision-making process.

Staff anticipates this evaluation framework will work in conjunction with a forthcoming Events By-law which will identify class, type and economic impact of each event.

Staff notes that Council also receives requests for sponsorship (e.g. golf tickets, charity dinners, flag/hole sponsorship, ski hill sponsorship, etc.). Staff recommends as part of this framework that these requests continue to be brought forward to Council throughout the year through the Council Donations Budget, as budget permits.

Staff will continue to research and consider other best practices, identify the efficacy of the framework for both stakeholders and Town Council and offer amendments and improvements to the process as required.

Staff is of the opinion that, pending approval from Council, this framework be implemented immediately in preparation for the 2012 Budget year.

### **C. The Blue Mountains' Strategic Plan**

- 6.5 Involve the community, business sector, developers, public partners and others in the ongoing work of the municipality
- 6.6 Implement processes for continuous improvement

#### **D. Environmental Impacts**

None.

#### **E. Financial Impact**

There is no financial impact with respect to the framework itself. However, requests for funding processed through this framework will have a budget impact, determined annually through the budget process.

#### **F. Attached**

None.

Respectfully submitted,

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