

City of Peterborough

Financial Support to External Organizations Review

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1. INTRODUCTION

(a) Reason For Review

Many local Not for Profit organizations and Registered Charities (NFP's) are challenged to sustain their operations. Many now rely on financial support mechanisms provided by the City of Peterborough. The current support mechanisms are inconsistent in terms of accountability, and may be inadequate to support the need.

(b) Report Origins

This report is the result of an initiative from the City's Arts, Culture & Heritage Advisory Committee (ACHAC). At its inaugural planning and priority setting session in the fall of 2005, ACHAC identified the separation of grants to arts, culture & heritage organizations from the Community Grants program as one of its top priorities. It created a Grant Review Subcommittee that contributed to the development of a draft report from the Director of Community Services to address ACHAC's proposed separation and concerns about funding to organizations outside of the Community Grants program.

The draft report resulted in several developments. The responsibility for the Community Grants program transferred from the distribution department, the Finance and Administration Department to the program department, the Community Services Department. The Directors of the Community Services Department and the Social Services Department were requested to support and monitor the 2006 Community Grants process and to prepare a comprehensive report for consideration. During the 2006 budget deliberations, Administration sought and received Council's support of the principle that the Report should consider all the ways in which the City provides funding to external organizations.

(c) Research Methodology

Research for this report included:

- review of Council minutes and corresponding reports relating to the Community Grants Program and funding requests/initiatives relating to external organizations for the past 20 years;
- review of the City's 2006 budget documents;
- review of the data gathered by ACHAC's Grant Review Subcommittee;
- review and analysis of the 2006 Community Grant Committee review process and recommendations, including its evaluation of the Community Grant process;
- development and analysis of a database of all financial information submitted for the 2006 grant application and of a database of previous Community Grant awards;
- feedback from a focus group representing a cross-section of successful applicants from the 2006 Community Grant process;

- feedback from a focus group representing a selection of unsuccessful applicants over the past several years;
- interviews with the Mayor and all members of the previous Council;
- interviews with all directors from City departments;
- interviews with all arts culture and heritage organizations currently receiving direct grants from the City outside of the Community Grants program;
- interviews with the senior staff from several organizations currently receiving funding from the City through Fee For Service contracts;
- interview with the Executive Director of the United Way and a review of a recent research paper **Community Process to: Address the Urgent and the Emergent Social Issues of this Community**, prepared by the Social Planning Council for the United Way;
- interview with a representative from the local office of the Trillium Foundation;
- collection and review of related literature and funding programs from a range of federal, provincial and municipal governments including: Canada Council and Museums Assistance Program; Trillium Foundation and Ontario Arts Council; and the cities of Ottawa, London, Kingston, Guelph, Sault Ste. Marie, Barrie, and Toronto;
- progress meetings with the CAO and directors of Community Services and Social Services Departments.

2. FACTORS CONTRIBUTING TO THE NEED FOR MUNICIPAL GRANTS

(a) Effects of Realignment of Services/ Disentanglement

The past twenty years have seen significant changes in what the senior levels of government support and fund. During that time, both senior levels have decreased the number and level of funding programs for operating grants, project grants, and capital projects. Where operating grants still exist, they may have been “frozen” for a considerable period of time. In addition, the senior level of government funding programs focused on the capital needs of hard infrastructure projects relating to safe drinking water, waste water management, roads and bridges.

The Big City Mayors’ Caucus report, **Our Cities, Our Future**, submitted in June of 2006, summarized the impact of these changes on municipalities as follows:

Cities are often required to deliver services that reflect the priorities of the provincial/ territorial or federal governments without access to corresponding sources of revenue. (p. 5)

...The federal and provincial/ territorial governments’ efforts to balance their budgets are often achieved at the expense of municipalities. (p. 30)

While all municipalities, and single-tier cities in particular, have been impacted by this trend, NFP's have also been adversely affected.

(b) Pressures on the Not For Profit Sector

This political climate has created tremendous pressures on NFP's in other ways as identified by Katherine Scott, in her report **Funding matters: The Impact of Canada's New Funding Regime on Nonprofit and Voluntary organizations**. Pressures include: a move to project funding as opposed to core funding, narrowly defined eligible costs, extensive reporting requirements, and an increased emphasis on partnerships. (See Appendix A for more details)

A recent report prepared by the Social Planning Council for the United Way of Peterborough & District stressed the growing pressures on local social service organizations and concluded that:

Recognizing that \$2 million will not support the true needs of this community, the (United Way) campaign should state that over \$3 million is needed to meet the true needs of this community and that a multi-year strategy should be developed to address the community's needs. (p.4)

(c) City Funding and Quality of Life

While the City of Peterborough has provided funding support for NFP's for years, some critics still question this. The provision of funding, however, relates directly to quality of life in the community. The Peterborough Social Planning Council provides an excellent definition of this in their recent publication **Quality of Life 2006:**

Quality of Life can best be described as the degree to which people have a sense of well-being in relation to the space in which they live, work and play. Generally, communities that are safe, attractive, environmentally sound and culturally rich are not only desirable places to live but tend to thrive economically.

...By investing in the preservation and enhancement of natural, social, cultural and physical features, municipalities distinguish themselves. While it is important to invest in the physical infrastructure of a community, people are drawn to a community because of the combined effects of all of these elements of community well-being. (p. 5)

Refer to Appendix B for more information on the Role of Government and Quality of Life.

3. CONCERNS IDENTIFIED WITH EXISTING CITY FUNDING SUPPORT

(a) Lack of Transparency

This concern lies at the heart of why this study was initiated. Community groups questioned why some groups, like the Canadian Canoe Museum, Showplace Peterborough, the Festival of Lights, Peterborough Social Planning Council, and Peterborough Green-up, receive significantly higher levels of secured annual funding from the City outside of the Community Grants program. There is also the concern that some organizations receive several different types of financial support from the City.

Some expressed frustration that various groups circumvent the Community Grant process by going directly to Council with requests for capital, special project, or on-going funding support; for example, the Lakefield Skating oval, the DNA Cluster at Trent, the Canada-wide Science Fair, the International Plowing Match, and the new Y.M.C.A..

While the City does provide a comprehensive and transparent overview of all of its financial transactions in the four volumes of the annual budget documents, the concerns underscore the need to identify all of the ways that the City provides funding support to external organizations.

(b) Link to Strategic Priorities

Consultation resulted in strong suggestions that the City be more strategic in providing funds to NFP's. The City should determine what it hopes to accomplish over time by providing financial support to NFP's. Ideally, the priorities should flow from the City's Goal Statement and Strategic Priorities. More specific objectives could be determined from the existing Community Social Plan, Initiative Overview dated May 2006 as prepared by the Peterborough Social Plan Committee, which identifies the following priorities:

- access to arts, culture, heritage and recreation
- access to health
- accessibility
- child care and child development
- community involvement
- economic/ income security
- environment
- food security
- housing
- human rights
- safe communities
- seniors/ aging
- transportation

More sector-specific priorities could be developed in conjunction with the up-coming Vision 2010 review and the development of a Municipal Cultural Plan.

(c) City Community Grant Program Changes

A review of the past twenty years of City funding to external organizations shows:

- the existence of a specific grant program to support NFP's throughout the period (Special Grants, Community Partnership Grants, Community Funding Grants), currently referred to as Community Grants;
- significant fluctuations in the level of funding available from the City to NFP's as the result of internal and external budgetary pressures;
- development of other funding or tax relief mechanisms to provide support;
- periodic adjustments of "who is in and who is out" of various City grant programs, without rationale or evaluation criteria;
- corresponding cyclical Council review of: "why does the City provide funding?; who and what does the City fund?; and how does the City decide who gets what amount?"

(d) The Current Community Grant Program

A number of concerns were expressed about the current Community Grant Program.

i) Who gets funded

While it is generally accepted that the program only provides grants to NFP's, some concerns have been raised about the four funding streams: Social Services and Health; Arts, Culture and Heritage; Recreation; and the Environment. Over time the program has evolved to the point where the majority of successful applicants are either Social Services/ Health (30/49) or Arts, Culture and Heritage (18/49).

There are few recreation and no environment agency applications. It was suggested that applicants from these sectors have been conditioned that they will not be successful and over time have stopped applying. This past round, a number of applications that could fall within these categories were either identified as eligible but not recommended for funding or were deemed ineligible. The creation of other City support mechanisms, like the Parades and Processions Policy, which was amended February 16th, 2004 through Report FAFS04-006, has reduced pressure on the Community Grants Program.

On a related matter, the Grant Review Committee expressed some challenges in dealing with applications received in 2006 from faith-based organizations requesting assistance for non-religious activities. The Committee has asked for specific direction in future grant criteria.

ii) Type of Funding

The current Community Grant program supports a wide range of funding needs excluding capital projects. Accordingly, NFP's use it as seed money for pilot projects, as project funding for on-going annual events, as program funding for on-going identifiable programs within a large operation, or as contributions to operating. Some applicants reported changing their approach from one year to the next in the hope of success. Many organizations receiving annual funding rely on it as operating support and dream of incremental increases. If, however, the program focuses on providing operating funding for existing successful applicants, it decreases funding opportunities for new organizations or ventures. Not surprisingly, this is confusing for both the applicants and the Grant Review Committee.

Although the majority of successful applicants have come to rely on City funding as operating support, there is still the view that the Community Grant program should be used only as seed money. Organizations should be striving for self-sufficiency and should, therefore, be supported by the funding program for a limited time only.

Sustainability is the issue. NFP's cannot sustain their current level of programming without City funding. In the face of ever-changing political priorities and short-term projects, they need a secure foundation of operating support. All members of the former Council involved in the discussions supported the prospect of multi-year funding.

iii) The Application Process

Respondents identified several concerns with the application process. Many found the application form too long, too repetitive, and too geared to arts organizations, which resulted in some confusing language for applicants from other sectors. Some also expressed concern about the rigorous process of completing a fourteen page long application and submitting to a grueling and lengthy review process for several thousand dollars when some other organizations appear to receive significantly more funding through other means without the same degree of scrutiny.

The Focus Groups, representing both successful and unsuccessful applicants, agreed that the process should also include some reporting mechanism on the results and impact from the previous year's funding. This is in keeping with the direction the Peterborough and District United Way is heading with the development of measurable indicators and outcomes for their funding program.

iv) The Evaluation Process

Various respondents expressed concerns about the role and composition of the Grant Review Committee and about perceived conflicts of interest. In its current form, the Committee is a working citizen committee that reviews every single application, assesses eligibility, evaluates the organization and the merits of the proposal, determines funding level, and presents final recommendations to Council for approval. The staff role is purely administrative. While the City recognizes and appreciates the considerable commitment of time and energy required to complete this process, it should provide stronger and better defined evaluation criteria and more staff resources. This will offer some relief to the detailed citizen review component and provide consistent analysis by qualified staff to ensure accountability.

In terms of composition, last year's Committee had four representatives appointed by Council to represent the community interest and four representatives from the Quality of Life Coalition representing social services and arts organizations. While the Quality of Life Coalition came into existence in the mid 1990's when the grant program was in jeopardy, it no longer exists formally. This reinforces concerns that the current composition provides too strong a voice from the applicants, reinforcing the perception that it may be self-serving. Although there are merits in using peer review, some of the respondents argued that Council and the City have abdicated their role and responsibilities.

Participants in the Focus Group for non-successful applicants also expressed concern about the appeal process, which is held after the recommendations have been submitted to Council. They agreed that there should either be an appeal process that could influence the results or no appeal process at all.

Collectively, these concerns underscore the need for:

- all committee members to be appointed by Council;
- clear and specific criteria from the City for the Committee to use;
- a consistent approach to conflict of interest guidelines both in the selection of committee members (for direct conflicts) and in the review process (for indirect conflicts).

4. CITY SUPPORT TO EXTERNAL ORGANIZATIONS IN 2006

This report excludes facilities, programs and services that are owned and operated directly by the Corporation of the City of Peterborough as mandated by the Municipal Act 2001 and other provincial legislation. It also excludes provincially mandated levy contributions to the City County Health Unit, ORCA, and the Police Services Board; transfer to North Monaghan for Compensation and to Otonabee and Smith Townships for Annexations; and contractual contributions to the GPAEDC and to profit-oriented businesses.

The City of Peterborough provided \$6,356,621 to 127 community agencies in a number of ways and for a variety of reasons in 2006 including: Transfers to Other Organizations, Fee For Service Contracts, Rebates to Registered Charities, Property Tax Exemptions (including Municipal Capital Facilities), Parades and Processions, Capital Projects, In-kind Support, Interest-free Loans, Operating Grants, Community Grants and Direct Appeals to Council. See Appendix D for a detailed breakdown of City funding support.

(a) Transfers

In 2006, the City provided \$139,768 in funding to 7 groups through transfers of funds. Over time, the City has established several advisory committees and provided funding. One example is the Council for Persons with Disabilities, which has been asked to fulfill the legislated responsibility for an advisory committee under specific legislation. Typically, these committees either continue to work closely with respective City departments or they become more autonomous. Regardless, they continue to rely on City funding outside of the Community Grant process.

The City also uses transfers to provide support grants to organizations like Community Care Peterborough that no longer falls under the category of community grants. In the past, the City has also funded events and capital projects like the International Plowing Match and the Lakefield Skating Oval in this way.

(b) Property Tax Rebates to Registered Charities

In 2006, there were 42 organizations receiving a municipal property tax rebate in the amount of \$196,714. While the City has been providing a level of support in this way for a number of years, it has only been 100% support since 2005. In report FAFS05-040, dated November 7, 2005, the Director of Finance and Administrative Services proposed to increase the tax rebate to registered charities from the former 40% level to a full 100% for the taxation year 2006 and after.

This type of support is only available for registered charities owning or renting property in buildings zoned as either commercial or industrial. As a rebate program, the charitable organizations must apply annually. Through this program, the City covers its 40% share of the property tax rebate with the balance of the property tax absorbed or funded by the province. While this represents a 40% cost (or loss of revenue) to the corporation/ taxpayer, it represents a 100% property tax relief to the eligible organizations.

One advantage of an annual rebate program is that participating organizations are regularly reminded of the level of support from the City.

(c) Property Tax Exemptions

A number of organizations and facilities are exempt from taxation because the Municipal Property Assessment Corporation, in accordance with the Assessment Act, has classed them as exempt properties.

Section 3 of the Assessment Act sets out the exemptions. Since many of the exemptions are long-standing, specific dollar valuations are not available for most. But, the 2006 statistics do identify \$124,427 in relief to Market Hall, the Theatre Guild, Hutchison House, Showplace and various veteran associations. Selections from the list of possible exemptions include:

- cemeteries, burial sites, crematoriums;
- churches;
- public educational institutions;
- philanthropic organizations (philanthropic, religious or educational seminary);
- public hospitals;
- municipal property;
- boy scouts and girl guides;
- house of refuge (house of refuge, reformation of offenders, care of children);
- charitable institutions (Red Cross Society, St. John's Ambulance; any charitable non-profit philanthropic organized for the relief of the poor);
- Children's Aid Societies;
- Scientific or literary institutions (public libraries, agricultural and horticultural organizations);
- improvements for seniors and persons with a disability;
- airports;
- conservation land;
- small theatres (less than 1000 seats) used predominantly to present live performances of drama, comedy, music or dance;
- large non-profit theatres more than 1,000 seats, used for a total of at least 183 days in the taxation year for the rehearsal or presentation of live performances of drama, comedy, music or dance, including opera or ballet, if the live performances are not presented with the intention of generating a profit.

In the past, several other community organizations have been granted property tax exemptions through Private Member's Bills, like Hutchison House and the original YMCA.

(d) Municipal Capital Facilities

In 2006, the City provided \$96,583 in a tax exemption to the Canadian Canoe Museum as a Municipal Capital Facility. The Municipal Act provides a mechanism for exemption from property taxes and development charges by enabling municipalities to declare certain types of facilities as Municipal Capital Facilities. These are defined as facilities that are:

- used by the council;
- for the general administration of the municipality;
- related to the provision of transit and transportation systems;
- for the collection and management of residential waste and garbage;
- municipal community centres and facilities used for cultural, recreational or tourism purposes;
- parking facilities ancillary to any of the facilities described above;
- municipal general parking facilities.

Furthermore, if a municipality designated as a service manager under the Social Housing Reform Act 2000, has entered into an agreement under this section with respect to housing capital facilities, they may also be designated as Municipal Capital Facilities.

To become a Municipal Capital Facility requires a staff recommendation report to Council and a formal agreement with the organization/ facility. Current Municipal Capital Facilities include: Canadian Canoe Museum, Showplace Peterborough, the New YMCA, and a number of affordable housing projects. Showplace is now exempt from taxation under the Assessment Act, and does not require exemption as a Municipal Capital Facility.

When such properties are designated as Municipal Capital Facilities, there is usually a requirement that the owner provide the City with a reversionary interest in the land and premises indicating that the property shall, at the option of the City be re-conveyed to the City by the owner on default of their obligations under the agreement with the City.

The disadvantage of property tax exemptions and Municipal Capital Facility designations is that over time, organizations take the exemption for granted and forget the on-going support from the City and the taxpayers who are absorbing that cost.

(e) Parades and Processions

In 2006, the City provided \$32,305 to support 16 local NFP's organizing parades and processions. NFP's organizing parades and processions can request that the City cover the required costs like policing, signage, barricades, and administrative fees. Such requests are reviewed and authorized by the Chair of Council's Budget Committee on a case-by-case basis pending availability of funds.

(f) Capital Projects & Special Events

In 2006, the City provided \$2,217,000 in funding support to several local capital projects or special events including: the construction of the new YMCA, support for the Regional Promotional display at the International Plowing Match, Communities in Bloom and future commitments to support Trent University's successful bid to host the Canada-wide Science Fair in 2010.

In the past this type of funding has also been used to support the Lift Lock Centennial Celebrations, the City's own Centennial Celebrations (Imagine Peterborough), hosting conferences, and provincial, national, or international sporting events like: the Ontario Games for the Physically Disabled, Ontario Summer Games, Ontario Winter Games and the upcoming 2007 World Women's Lacrosse Tournament.

Support for such capital projects and special events can be initiated by City staff in various departments, directly by a member of Council, or by requests from project proponents. Council may approve such requests in response to recommendation reports presented to Committee of the Whole or during budget deliberations.

(g) In-Kind Support

In 2006, the City also provided an estimated \$1,292,772 in in-kind support to a broad range of community-based activities like: recent support for the YMCA (\$1,220,000); rent-free office space to Festival of Lights (\$5,400 est.) and Homegrown Homes (\$4,800 est.); support of special events like the International Plowing Match directly from the operating budgets of various departments, covering costs such as: bus transportation, tipping fees, septage treatment, and staffing contributions (\$44,100); rent-free use of city hall meeting spaces, photocopying, and mailings. In-kind support is usually left to the discretion of facility managers, divisional managers and directors.

As a general rule, however, the City does not waive the rental fee for City Facilities. In some cases, it can be offset if senior staff agree to sponsor the event or if a department agrees to pay the rental cost.

Since the City can issue income tax receipts for donations to corporate projects, this service can be used, in some circumstances, to collect funds and issue receipts for local capital projects undertaken by NFP's that are not registered charities. The "Income Tax Receipts for Cash Donations and Gifts-in-Kind" policy was approved by Council on March 6, 2000 based on recommendations contained in Report FAFS00-002, dated February 2000 of the Director of Finance and Administrative Services. To be eligible, projects need to be either municipal priorities or considered to be in the community interest; for example, the Wall of Honour project. Collection of funds and issuance of receipts requires Council approval.

(h) Interest-free Loans

Although the City does not usually provide capital funding support to non City-owned facilities, it has provided interest-free loans to NFP's when the project is deemed to be in the City/ Community's interest. It is often used in joint ventures.

Previous examples of interest-free loans include: Showplace Peterborough during its capital fund-raising campaign; the Lions Centre during its reconstruction; Market Hall Performing Arts Inc. to upgrade the washroom facilities; Hutchison House (Peterborough Historical Society) for the installation of a new cedar shake roof; and the Peterborough Soccer Council, and for the clubhouse facilities at Eastgate.

Interest-free loans are negotiated by staff with project proponents and brought forward for Council approval either through the Committee of the Whole or the annual budget process. This results in a formal agreement between the applicant and the City. In the preparation of the recommendation report, staff calculates the value of lost interest as a budget implication for audit purposes.

(i) Operating Grants

In 2006, the City provided \$296,555 in operating grants to the Festival of Lights, Canadian Canoe Museum, Showplace Peterborough and the Peterborough Architectural Conservation Advisory Committee (PACAC), through the City's Arts, Culture & Heritage Division; and to Activity Haven and the Senior Citizens Association (Mapleridge) through the Recreation Division.

The provision of an operating grant is typically the first way that many local NFP's have received funding outside of the Community Grants Program. The operating grant is awarded on recommendation from City staff to Council, usually because the proposed recipient provides a specific/ identifiable product or service that is seen to be in the Community's best interest and because there is a requirement for a significantly higher level of programming from the City. In the past, the City also provided operating grants to the Peterborough Social Planning Council and to Peterborough Green-up. Both are now funded as Fee For Service contracts.

The Festival of Lights has received funding from the City outside of the Community Grants Program for a number of years in recognition of its role as one of the region's premier tourist attractions. PACAC, as an advisory committee to Council, has received funding for years to support its promotion of built heritage preservation. The annual contribution increased in 2006 in recognition of PACAC's lead role in organizing the City's annual Doors Open Peterborough event.

The provision of operating grants to Showplace Peterborough and the Canadian Canoe Museum reflect a parallel pattern. Both have longstanding relationships with the City. Both have been designated as Municipal Capital Facilities. And, both have become

recipients of sizeable operating grants as a result of significant financial challenges facing the organizations. This led to emergency funding requests to the City and resulted in Council support subject to a broad range of terms and conditions. For more details, refer to reports: CSCH01-001 (April 9, 2001) and CSCH01-004 (October 1, 2001) for Showplace; and reports CSCH04-008 (March 1, 2004) and CSCH04-018 (December 6, 2004) for the Canoe Museum. In both cases, the City identified a broad range of terms and conditions with the initial funding.

Each year, the operating grant recipients provide the Arts, Culture & Heritage Division with a copy of their annual audited statement from the previous year and with support information for the budget documents. The Division Manager works closely with these groups throughout the year by providing advice and support, by assisting with the recruitment of senior staff, and by providing references for grant applications to other funders.

Despite this close relationship, there is no formal mechanism for the organizations to be considered for any increases to their initial operating grant. During the 2007 budget process, the Canoe Museum requested an additional \$30,000; Showplace requested an additional \$20,000, and during the budget deliberations, there were several attempts to secure additional funding for Festival of Lights. Although this component of their funding has been frozen for several years, the value of the property tax relief through the Municipal Capital Facility designation continues to increase. These factors underscore the need to review and revise this funding mechanism.

(j) Community Grants

The Community Grant program, in its various forms over the years, is the funding program that is familiar to most of the smaller organizations. According to the 2006 application form, the Community Grants program is intended to “provide financial assistance to non-profit, community-based organizations that provide direct programs, services, or activities that enhance the quality of life for Peterborough residents in the areas of social services, health, arts, culture, heritage, recreation and the environment.”

In 2006, a total of 64 organizations applied to the Community Grants program requesting \$421,119.50, which represents 205% more than the \$205,000 available. The Community Grants Review Committee (Review Committee) recommended grants to 49 organizations, including a number of first time applicants. Of those recommended for funding, 30 were from the social services & health sector; 18 were from the Arts, Culture & Heritage category; and 1 could be classified as recreation. Of the 15 organizations who were not recommended for funding, 6 were from social services/ health; 5 were arts/ culture & heritage; 4 were recreation. There were no applications for environmental projects or organizations.

Of the 15 organizations that did not receive funding: 9 were identified as eligible but not recommended for funding including 3 faith based organizations; 5 were declared

ineligible as either large events, as fund-raising events, or as hobby groups; and one withdrew its application.

The applications provide a significant body of information relating to the 64 applicants as a significant proportion of the City's NFP's. Collectively, they represent total revenues of \$20,179,438 with 56% of the funding coming from government sources including: 47% provincial, 5% federal, 3% other and the City share representing 1%; with the balance of funding coming from earned revenues.

There were significant differences in revenue sources between Arts, Culture & Heritage organizations and the Social Services and Health sector. In the former, 22% of the total funding came from government (10% provincial, 7% federal, 3% other, and 2% from the city). In the latter case, a total of 62% percent of funding came from government including: 53% from the province, 5% from federal sources, 3 % from other and 1% from the City.

The vast majority of funding (79%) for Arts, Culture & Heritage organizations and activities came from earned revenues like net fund-raising (24%), ticket sales (21%), memberships (11%), user fees (9%), other sources (8%), and donations (6%). With Social Services and Health Organizations, 39% of revenues were earned from user fees (12%), memberships (10%), other sources (10%), net fund-raising (4%), and donations (3%).

(k) Fee For Service Contracts

In 2006, the City provided \$1,755,497 in the form of Fee for Service Contracts. This form of support has evolved over time, initially as a mechanism to fund local community groups that required more funding than the Community Grants program could sustain.

Consultation with City directors detailed expectations of Fee For service contracts. The general consensus is that a formal agreement between the City and the grant recipient should be formulated when a municipal grant:

- provides essential funding to support a core function or service of a community agency, such that the agency would not be able to provide a core service without municipal funding. In this case, municipal funding may be part of a leveraged funding program but is nevertheless essential to sustainability;
- provides funding to purchase a service to the City essential to the mandate of a City program;
- provides funding to purchase a service to the City at the direction of Council;
- provides funding necessary to the completion of a special project, including researching, developing and leveraging other funding leading to sustainability or other essential but time-limited need;

- is a significant amount, greater than \$15,000, that can be sustained by the proposed Community Investment Program.

In these cases, the directors felt that the relationship between the City and the recipient agency required a higher level of accountability. This contrasts with the award of an annual grant to support a non-essential component of agency service or to complete a limited special project, which is believed to be the original intention of the existing Community Grant program.

The relationship between the City and Trent University with respect to the DNA Cluster project typifies a situation wherein the requirements of the procurement policy do not apply but where the City may wish to establish a legal agreement in terms of the conditional grant identifying the expected outcomes and the evaluation measure to be applied to meet public accountability requirements.

The directors identified that Fee For Service agreements should include some or all of the following accountability requirements:

- compliance with the financial policies of the corporation regarding competitive process in all cases, resulting in a fair, transparent and accountable award of funding in the form of a legally binding service contract;
- submission of a business plan with all proposals for core funding to demonstrate the overall fiscal stability of the service provider and that demonstrates long term sustainability of the program or service, except in the case of project-based funding;
- inclusion of information that demonstrates the proponent's proven ability to effectively and responsibly manage the service delivery of project implementation;
- inclusion of a process of third party oversight, such as an audit or provision of financial statements, as a measure of public accountability;
- statement of clearly stipulated service products or deliverables to be achieved through the provision of core funding, and plan for the provision of regular reports to the municipality demonstrating that the key performance indicators have been achieved;
- an outline for program/ service evaluation to be completed by the parties during or at the conclusion of the agreement.

Fee for Service agreements with the City usually require a recommendation report to Council and a formal agreement with the contract agency. The agency must agree to and comply with all requirements of a service contract/agreement including: reporting requirements, evaluation/audit criteria, record keeping, communications and other

stipulations that may be required. Contracts must be reviewed and renewed by Council as per purchasing requirements.

(l) Direct Appeals to Council

The Community Grants program was originally created to reduce the number of NFP's going directly to Council. While the existing program and other funding support processes have substantially reduced the number of direct requests, some funding requests will still fall outside of the established programs. One-time requests to sponsor/host large special events, emergency situations, and economic development opportunities or joint ventures with other community partners will continue to require a report to and approval by Council.

(m) Recommendations

It is recommended that the City of Peterborough:

- **continue to provide financial support through a variety of means including: property tax rebates to registered charities, property tax exemptions, Municipal Capital Facilities, parades and processions, capital projects and special events, in-kind support, interest-free loans, and direct project-specific appeals;**
- **consolidate the funding support to NFP's currently receiving funding as a result of transfers, operating grants, and municipal cultural facilities into the proposed Community Services Grant program;**
- **restrict the number of ways that NFP's can receive City support to no more than two;**

5. PRINCIPLES AND DIRECTION FOR PROPOSED FUNDING CHANGES

(a) City Strategic Priorities

City granting priorities should reflect community and municipal strategic statements.

(i) Regional Vision Statement

By the year 2020, the GPA (Greater Peterborough Area) will be sought out by many, and admired worldwide, as a uniquely healthy, diverse, enriched community which balances and promotes vibrant economic and employment opportunities while honouring the natural environment and valuing its cultural heritage. (GPA 2020)

(ii) City of Peterborough Draft Goal Statement (2006)

“To celebrate and nurture the distinctive strengths of our community by balancing healthy living and economic prosperity”

(iii) City Draft Strategic Priorities

- **maintain principled community planning**
- **enhance organizational effectiveness**
- **sustain fiscal growth**
- **nurture community lifestyle and identity**
- **maintain security of people and property**
- **manage infrastructure responsibly**

(b) City Funding Priorities

Ideally, the City’s funding priorities should be congruent with its strategic priorities and reflect the aims identified in the Community Social Plan, Vision 2010, and the GPA 2020 process. Accordingly, the City will place priority on community-based initiatives that contribute to the quality of life for all residents, specifically those that:

- **enhance and protect human health and well-being;**
- **preserve and protect the City’s built and cultural heritage and the natural environment;**
- **enhance the City as a creative community by developing, promoting and providing access to arts, culture and heritage;**
- **enhance the City as a sports and recreational leader by promoting and providing access to physical, recreational and leisure activities;**
- **contribute to a sustainable local economy by forming creative partnerships within sectors, across sectors, and with the local business community.**

(c) Funding Streams

The City should continue to support NFP's within the following sectors: Arts, Culture & Heritage; Environment; Recreation; Social Services & Health. The funding streams are further defined as projects/events, activities, or programs that support/sustain, promote, inform/educate, celebrate, preserve and/or provide access to:

Arts: creative activity by professionals or non-professionals in various fine and applied art forms including but not limited to: visual, performing and performance, literary, media, and decorative arts;

Culture: beliefs, customs and traditions of certain communities, societies, or cultural groups relating to language, ethnicity, race, gender, sexual identity, disability, religion, class, and diversity;

Environment: beautification, conservation, documentation, interpretation, preservation, restoration, and research of the environment/natural heritage (air, water, flora, fauna, and natural landscape);

Heritage: identification, documentation, interpretation, or preservation of built heritage (structure, building or group of buildings, landscape), cultural heritage (archaeology, archives, genealogy, monuments, museums and galleries/collections), historic people and events, and traditions (customs and beliefs);

Recreation: activities contributing to physical health and well-being including: participation in sports leagues, instructional sports, fitness and wellness activities, leisure and hobby activities;

Social Services & Health: programs and services supportive to the social determinants of health (state of complete physical, mental and social well-being with a focus on prevention; access to housing, food and clothing, freedom from violence).

(d) Participant Priorities

- **People who are low income, at risk, isolated or otherwise marginalized**
- **Persons with Disabilities**
- **Youth**
- **Seniors**
- **Families with children**
- **Neighbourhood associations**

(e) Eligible Applicants

The City will consider the following as eligible applicants for the proposed funding programs:

- Incorporated and unincorporated NFP's,
- Located, and conducting the majority of their activities, within the geographic boundaries of the City of Peterborough

(f) Ineligible Applicants

The City will not consider the following as eligible applicants for the proposed funding programs:

- individuals
- for-profit businesses
- organizations with political affiliations
- organizations serving as funding sources for others, e.g. Service Clubs
- faith organizations where services/activities include the promotion of, and/or required adherence to a faith
- hospitals, clinic-based services or medical treatment programs
- fund-raising events
- school boards, primary and secondary schools, post secondary institutions
- programs within legislated mandates of other government or city departments
- provincial/national organizations unless a local chapter exists to service the residents of Peterborough
- organizations receiving 80% or more of funding from senior levels of government
- organizations that conduct the majority of their activities outside of the City
- costs for major capital equipment/ renovations and minor renovations; and financing of deficits

(g) Applicants should demonstrate

- one or more City priorities and participant priorities within target sectors;
- Community need for proposed activity or service;
- Community support (funding support or sponsorship from other organizations, local businesses, industry, service clubs);
- Community benefit/impact;
- financial need (operating surpluses or reserve accounts should not exceed 25% of total operating without acceptable explanation, e.g., capital campaign);
- sound financial management and revenue generation (accurate records, responsible budget, various sources of income; if deficit, then reduction plan);

- accountability/mechanism for evaluation (identification of key performance measures and outcomes);
- feasibility (organization's ability to complete the proposed activity or service);
- evidence of community collaboration, partnerships;
- impact of previous year's funding support.

(h) Community Project Grants

Intent:	seed money or support for a specific project or special event; up to 50% of direct project costs; can be matched to gift in-kind support
Amount:	\$250 to \$1,000 (pending availability of funds)
Frequency:	1 application once a year, may apply annually
Applicants:	New or existing, incorporated or unincorporated NFP's, neighbourhood associations
Ineligible:	Recipients of Community Investment Grants or Community Service Grants. See also general list of ineligible applicants.
Application:	Completed application form; project proposal; project budget
Approval Process:	Evaluated on the basis of proposal merits; identified community need; fit with City priorities; funding or in-kind support from other organizations/sectors; measurable outcomes; Reviewed and approved by senior staff in respective departments; Requires Council approval for budget but not for individual grant allocations; No appeal process.
Recognition:	Successful applicants will formally recognize the City's contribution

(i) Community Investment Grants

Intent:	Support projects and special events requesting more than \$1,000 in funding, specific programs or operating budgets of eligible applicants (if it is funding for a specific program, the budget figures submitted must relate directly to the program)
Amount:	\$1,000 to \$15,000; up to 33% of specific project, program, or operating budget
Frequency:	1 application, once a year; may apply for 3-year funding with no additional annual increases

Applicants:	<ul style="list-style-type: none"> -Incorporated NFP's with local boards of directors -sustained a history of activity over two years prior, normally achieved as past recipient of at least two Community Grants or two Community Project grants -to be eligible for multi-year funding must have been in existence for more than 5 years -demonstrate financial stability and good standing with the City -NFP's can no longer apply through a sponsoring agency
Ineligible:	-new unincorporated NFP's or NFP's receiving Community Project or Community Service grants. See also general list of ineligible applicants.
Application:	<ul style="list-style-type: none"> -completed application form including project proposal; project budget; audited statement from previous fiscal year -brief report on previous year's results if funded by City -appropriate support material
Assessment:	<ul style="list-style-type: none"> -evaluated on the basis of completed application form and all required materials; proposal merits; identified community need; fit with city priorities; funding or in-kind support from other organizations/sectors; measurable outcomes. -screened by City administrative staff -reviewed and rated by Grant Advisory Committee -staff provide recommendations to Council based on advisor's comments, city priorities, and volume of applications -New applicants for operating or annual funding must reach a standard of "good" in order to be considered for funding. -Successful repeat applicants receiving the standard of "good" or "excellent" will not receive less than 80% of previous grant unless overall funding levels decline -Applicants may be denied funding or receive less than 80% of previous if they don't reach the standard of "good".
Recognition:	Successful applicants will formally recognize the City's contribution.

(j) Community Service Grants

Intent:	To recognize and support municipally mandated/approved community services provided by local NFP's
Amount:	\$15,000 and up; not to exceed 25% of the organization's total operating funding
Frequency:	annual or multi-year

Applicants:	<ul style="list-style-type: none">-incorporated NFP's with local boards of director-in existence for more than 8 years-demonstrate financial stability and good standing with the City-strategic plan for next 3 years-NFP organizations currently receiving transfers, operating grant, or managing Municipal Capital Facilities-organizations identified by City that provide a specific service that the City should be providing but the NFP's can do so effectively and efficiently-transfer of funds from senior government through the municipality to a community agency to achieve very specific outcomes/deliverables-funding the core program of an agency or service that is supportive to the attainment of municipal or community objectives that are not within the parameters of the municipal corporate mandate
Ineligible:	Recipients of Community Project Grants or Community Investment Grants in current year. See also list of ineligible applicants.
Application:	<ul style="list-style-type: none">-identified by City staff-potential service providers may approach the appropriate City departments for consideration-ideally completed through a formal Request For Proposals (RFP) process
Assessment:	By City staff
Approval Process:	<ul style="list-style-type: none">-Community Service Grants from the City require a recommendation report to Council and a formal agreement with the contract agency.-NFP must agree to and comply with all requirements of a service agreement including reporting requirements, evaluation/audit criteria, record keeping, communications and other stipulations to comply.-Contracts must be reviewed and renewed by Council as per purchasing requirements.-Business conducted by contract NFP's must be fully transparent as it relates to the services provided by the municipality and appropriate to the requirements of FOI etc.
Recognition:	Successful applicants will formally recognize the City's contribution.

(k) Community Investment Grant Advisory Committee

It is recommended that Council appoint a member of Council to chair and ten community volunteers to serve on the Committee Investment Grant Advisory Committee; with four members to be selected from the community at large; and four members selected with specialized expertise and direct working experience within the various sectors; with the final member having a professional background in finance to serve as a financial analyst. Council will recruit and appoint the committee members in accordance with its appointment process.

To avoid conflict of interest, the City will not appoint potential Advisory Committee Members if they, or direct members of their immediate family, have a financial or personal interest in the success or failure of any application submitted for Community Investment Grant Funding. This would include members of an organization's governing body or members of their immediate families.

To ensure confidentiality, members of the Committee will be required to sign a confidentiality agreement.

Based on the volume of applications received over the past several years, it is recommended that the overall committee be divided into two subcommittees with one committee to review applications from the Health and Social Services Sector and one to review those from the Arts, Culture & Heritage, Environment, and Recreation sectors.

Before assessment, members of the Advisory Committee will be expected to become familiar with the program, assessment criteria; read all applications and support material; review support material and discuss applications; identify funding priorities.

During the review process, they will assess the assigned applications and rate on a scale of excellent to poor. City staff will review the assessors' comments and ranking and prepare final grant recommendations for Council's consideration.

(l) Recommendations

- **It is recommended that the City of Peterborough:**
 - **continue to invest in the quality of life of its local residents by supporting the activities of NFP's that are located, and conduct the majority of their activities, within the geographic boundaries of the City;**
 - **establish a Community Project Grant program to provide seed money for informal or new NFP's for specific projects and special events;**

- **replace the existing Community Grants Program with a Community Investment Program to provide annual or multi-year program and operating grants for established incorporated NFP's;**
- **direct the appointment of a community-based Grant Advisory Committee to review all Community Investment Grant applications in 2007 and to make recommendations to City staff;**
- **establish Community Service Grant Agreements for all NFP's currently receiving city funding through transfers, operating grants, or designated as Municipal Capital Facilities;**
- **review the role and activities of all NFP's that are eligible for the Community Investment Program or that received Community grants in the past during the term of this Council to determine which organizations should be considered for funding through the Community Service Grant Program;**
- **Conduct a comprehensive review in 2010 to evaluate the proposed changes and to determine future direction.**

7. CONCLUSION

This report attempts to balance community needs and organizational funding requirements with the City's ability to provide financial support. To ensure transparency and accountability, it provides a rationale for on-going City funding to local NFP's. It outlines the various ways used by the city to support local groups. And it presents a consistent approach for the future delivery of City Project Grants, Community Investment Grants, and Community Service Grants.

8. ATTACHMENTS

Appendix A

Funding Pressures on the Not for Profit Sector

Excerpt from Katherine Scott's report **Funding matters: The Impact of Canada's New Funding Regime on Nonprofit and Voluntary organizations.**

Volatility – As organizations struggle to diversify their funding sources, they can experience huge swings in revenue. This volatility undermines an organization's stability and its capacity to provide consistent, quality programs or services, to plan ahead, and to retain experienced staff.

A tendency to mission "drift" – As organizations scramble to qualify for narrowly prescribed program funding or to win government contracts, some are being pulled away from their primary mission, which is their long-term purpose and the source of their credibility in the community.

Loss of infrastructure – With the move to project funding and the tightening of restrictions on administrative costs that are covered by funders, some organizations are losing their basic infrastructure. They are becoming a series of projects connected to a hollow foundation.

Reporting overload – Many smaller organizations are losing heart as they face yet another round of short-term contracts, short-term hiring and letting-go of program staff, all the while pursued for multiple reports from multiple funders with multiple forms and requirements.

House of cards – Because funders now often require financial or in-kind contributions from other sources, the loss of one contract or the end of one partnership agreement can bring down the whole interlocking structure. A service that is thriving one year can collapse the next. Organizations despair of arrangements in which funders will not commit until other funding partners are on-side, the last one standing being the preferred position.

Advocacy chill – When organizations must cobble together projects and partners to survive, being seen as an outspoken advocate on behalf of one's client group can be regarded as too risky, despite the justice of the cause. You do not want to have your name in the media when your next funding submission comes up for approval. Advocacy organizations have been effectively marginalized over the past 10 years.

Human resource fatigue – People, both paid and volunteer, are stretching themselves to the limit to meet the new challenges and remain faithful to their mission and to the communities to whom they feel responsible. But how long can this go on? (pg 14-15)

Appendix B

The External Advisory Committee on Cities and Communities outlines their view of the role of municipal government in the preface to their Final Report, **From Restless Communities to Resilient Places**, presented to the Prime Minister in June 2006:

We elaborated our basic vision with the hope and expectation that Canada's cities and communities will be models of environmental, economic, social and cultural sustainability, and that they will:

- sustain vibrant economies where all people can realize their full potential
- minimize their ecological footprints
- attract and retain talented people and encourage creativity and entrepreneurship
- foster respect and a sense of human dignity for one another through inclusiveness and kindness
- include new arrivals with grace and speed
- be surrounded by public spaces that are beautiful and accessible
- build on their distinctive human, cultural historical and natural characteristics
- ensure a civil and peaceful society for all people, and
- be places where people take personal responsibility for the success of their communities. (p. iv)

Appendix C

Factors affecting Quality of Life at the community level were outlined in **National Overview of Findings from a National Survey on the Quality of Life in Canadian Communities** as a report to Infrastructure Canada in March 2005. Respondents, including residents of Peterborough, ranked the desired community features that comprise quality of life in a town or city as follows:

- quality schools, colleges and universities
- green spaces and parks
- modern infrastructure
- affordable housing
- good public transit
- efficient composting and recycling programs
- easy access by air, rail or road to other cities
- thriving business community
- good sports and recreational facilities
- highly educated people
- well preserved historic buildings and older neighbourhoods
- high speed internet access
- an active arts and cultural community
- a thriving high technology sector
- services for newcomers and immigrants
- diversity (various ethnic, religious and language groups (p. 21))

This study also revealed that the contributions of volunteer groups are seen as having the biggest impact on the quality of life in their communities. (p. 6)

Appendix D

City Financial Support to External Organizations Chart

CITY FINANCIAL SUPPORT TO EXTERNAL ORGANIZATIONS - 2006													
ID #	Organization	United Way Agency	Community Grant	Property Tax Exemption	Registered Charity Tax Rebate	Operating Grant	Capital Project	Transfer	Service Contract **	Parades	Municipal Capital Facility	In Kind	Total
1	4th Line Theatre		\$2,000										\$2,000
2	Abraham Festival		X										\$0
3	Abuse Prevention of Older Adults Network		\$2,000										\$2,000
4	Achilles Track Club									\$827			\$827
5	Activity Haven (Senior Centre)					\$34,970			\$43,301				\$78,271
6	Alzheimer Society		X		\$4,857								\$4,857
7	Arbor Theatre		X										\$0
8	Art School of Peterborough		X		\$1,200								\$1,200
9	Arthritis Society				\$535								\$535
10	Artsweek							\$25,000		\$752			\$25,752
11	Artspace		\$7,500		\$769								\$8,269
12	Autism Society of Ontario, Peterborough Chapter		\$1,500										\$1,500
13	Bereaved Families of Ontario - Peterborough		\$500										\$500
14	Big Brothers & Big Sisters	*	\$3,500										\$3,500
15	Birthright of Peterborough				\$844								\$844
16	Bread Factory (Housing Project)										NA		NA
17	Brock (Cameron House)								\$62,502				\$62,502
18	Brock (Kingan House)								\$93,754				\$93,754
19	Brock (Warming Room)								\$62,502				\$62,502
20	Canada Day Parade									\$5,085			\$5,085
21	Canada Wide Science Fair						\$10,000						\$10,000
22	Canadian Blood Service				\$7,838								\$7,838
23	Canadian Cancer Society				\$3,734								\$3,734
24	Canadian Canoe Museum					\$70,000					\$96,583		\$166,583
25	Canadian Continenence Foundation				\$213								\$213

CITY FINANCIAL SUPPORT TO EXTERNAL ORGANIZATIONS - 2006

ID #	Organization	United Way Agency	Community Grant	Property Tax Exemption	Registered Charity Tax Rebate	Operating Grant	Capital Project	Transfer	Service Contract **	Parades	Municipal Capital Facility	In Kind	Total
26	Canadian Diabetes Assoc.-Kawartha Resource Centre		\$3,500		\$2,016								\$5,516
27	Canadian Hearing Society	*	\$3,500										\$3,500
28	Canadian Mental Health Association	*	\$3,500		\$2,285								\$5,785
29	Canadian National Institute for the Blind	*			\$1,306								\$1,306
30	Canadian Paraplegic Association				\$792								\$792
31	Canadian Red Cross	*	\$4,900		\$6,395								\$11,295
32	Canadian Woolen Mill										NA		NA
33	C.H.A.N.G.E.S Ptbo & Area Downs Syndrome Support Grp	*	\$2,500										\$2,500
34	CIBC Run/Walk for the Cure									\$2,336			\$2,336
35	Club 55 Bowling Tournament		X										\$0
36	Community Care Peterborough	*						\$12,118					\$12,118
37	Communities In Bloom							\$20,000					\$20,000
38	Community & Race Relations							\$24,900					\$24,900
39	Community Counseling and Resource Centre	*	\$2,500						**				\$2,500
40	Community Kitchen (c/o St. Paul's Presb.Ch)		\$2,000										\$2,000
41	Community Living Peterborough	*	\$4,500		\$7,601								\$12,101
42	Communities Opportunities & Innovation Network								**				NA
43	Cooked & Eaten Reading Series		\$1,500										\$1,500
44	Council for Persons with Disabilities							\$3,250					\$3,250
45	The Cure Collective		\$2,000										\$2,000
46	DBIA (Utility Services, Litter Collection)								\$46,750				\$46,750
47	DNA Cluster						\$500,000						\$500,000
48	Dragon Boat Festival									\$325			\$325

[illegible]

[illegible]

[illegible]

CITY FINANCIAL SUPPORT TO EXTERNAL ORGANIZATIONS - 2006													
ID #	Organization	United Way Agency	Community Grant	Property Tax Exemption	Registered Charity Tax Rebate	Operating Grant	Capital Project	Transfer	Service Contract **	Parades	Municipal Capital Facility	In Kind	Total
122	Rainbow Service Organization		\$3,500										\$3,500
123	River Ridge Housing Project										NA		NA
124	Royal Canadian Legion Branch 52			\$6,740									\$6,740
125	Rotary Club Victoria Day Fireworks									\$1,963			\$1,963
126	Rubidge Hall								**				NA
127	The Salvation Army				\$11,809				**				\$11,809
128	Schizophrenia Society of Ontario	*											\$0
129	Scouts Canada	*											\$0
130	Senior Citizens Association of Peterborough (Mapleridge)				\$7,930	\$11,585							\$19,515
131	Showplace Peterborough			\$62,059		\$80,000					*		\$142,059
132	St. Patrick's Day Parade									\$3,916			\$3,916
133	The Society of St. Vincent de Paul				\$3,127								\$3,127
134	St. John Ambulance	*	\$1,900										\$1,900
135	St. Joseph's Care Centre Foundation				\$1,559								\$1,559
136	Taoist Tai Chi Society of Canada				\$8,231								\$8,231
137	Telecare Distress Centre of Peterborough	*	\$4,400										\$4,400
138	Traveling World Community Film Festival		\$1,500										\$1,500
139	Trent Child Care Centre	*											\$0
140	Trent Radio		\$3,500										\$3,500
141	Trent Valley Literacy Association				\$4,182								\$4,182
142	Tri County Community Support Services				\$9,575								\$9,575
143	VEYO Good Friday Procession									\$406			\$406
144	Victorian Order of Nurses	*			\$4,183								\$4,183
145	Wall of Honour						\$107,000						\$107,000

[illegible]

Appendix E
Table of City Financial Support to External Organizations in 2006

	Community Project Grants	Community Investment Grants	Community Service Grants
Intent	-Seed money for project or special event -can be matched to Gift-In Kind support	-City investment in support larger projects/ special events, specific programs of large organizations, or operating budgets	City recognition and support of community service provided by local NFP's
Amount	\$250 to \$1,000; up to 50% of direct project costs	\$1,000 to \$15,000; up to 33% of project, program or total operating budget	\$15,000 and up; not to exceed 25% of organization's total operating
Frequency	Once a year	Once a year; may apply for 3 year funding with no additional annual increases	Annual or multi-year Community Service Agreement
Eligible	-new or existing, incorporated or unincorporated NFP's -Neighbourhood Associations	-incorporated NFP's with local board -past recipient of at least 2 Project or Investment Grants -in existence more than 5 years (for multi year) -demonstrate financial stability; in good standing with City -cannot apply through sponsoring agency	-incorporated NFP's with local board -past recipient of at least 3 Investment Grants -in existence more than 8 years (for multi year) -NFP's currently receiving transfers, operating, or managing Municipal Capital Facilities -NFP's providing a service on City's behalf -transfer of funds from senior level through City
Ineligible	-current recipients of Community Investment or Service Grants -proscribed list of ineligible applicants	-current recipient of Community Project or Service Grants -proscribed list of ineligible applicants	-current recipient of Community Project or Investment Grant -proscribed list of ineligible applicants
Application	-completed application form including: project proposal and project budget	-completed application form including: project proposal, budget, latest audited statement, report on previous year's results, appropriate support material	-identified by City staff -ideally through formal Request for Proposals -may be approached by potential service providers
Assessment	City Staff in department responsible	-rated by Community Investment Grant Advisory Committee -City Staff recommendation Report	City Staff Recommendation Report
Approval	City Staff in department responsible	Council	Council
Recognition	Formal recognition required	Formal recognition of City support required	Formal recognition of City support required

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