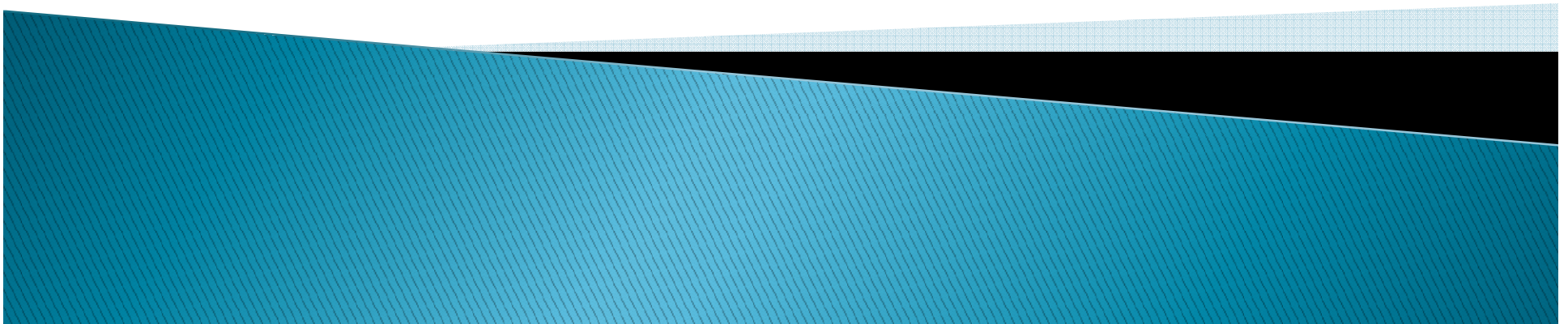


# City Funding to External Organizations:

ACHAC Presentation

May 8, 2014

K. Doherty,  
Director of Community Services



# Funding Programs: \$28,955,037/ 13%

## Contracts, Transfers, Development Incentives

Program	Detail 2013	Process	Approval	Contact
Transfers	\$27,132,787* Police, ORCA, PCCHU etc.	Mandated; Corporate Services	Council	Varies
Façade Improvements	\$100,000	Apply to Planning	Council	Ken Hetherington
Municipal Incentive Grant	\$100,000	Apply to Planning	Council	Ken Hetherington
Development Incentives (including Brownfields)	Waive fees, refund permits, waive tax >es	Apply to Planning	Council	Ken Hetherington
Service Contracts	Varies: Social Services, Social Housing etc.	Quotes, RFP's, Tenders, Single Source	Varies	Varies

# Funding Programs:

## Tax Relief, Cost Recovery

Program	Detail 2013	Process	Approval	Contact
Property Tax Exemptions	\$ unknown: Churches, institutions, charities; theatres with < than 1000 seats	Legislated	Province	
Registered Charity Tax Rebate	\$490,752* 56 orgs; own/rent Indus/ com	Apply to Corporate Services	Staff	Chris Heersink
Heritage Property Tax Relief	\$163,147 40% res 20% com	Designation 1 <sup>st</sup> ; apply to HPO	PACAC/ Council	Erik Hanson
Parades & Street Closures	\$32,084*; 21 nfp	Apply to Clerk's	Budget Chair	Jennifer Sawatzky

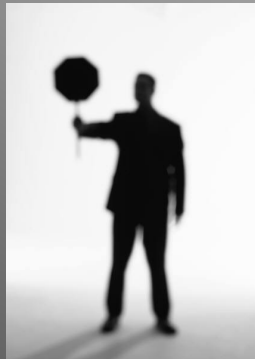
# Funding Programs:

## Grants

Program	Detail 2013	Process	Approval	Contact
Project Grants	\$20,000**; 31 nfp	Apply to Community Services	Council	Jennifer Patterson
Investment Grants	\$205,000** 40 nfp	Apply to Community Services	Council	Jennifer Patterson
Service Grants	\$638,100** 13 nfp	Community Services	Council	K. Doherty
Capital (usually Municipal Capital Facility)	\$275,000** 2	Community Services or Planning	Council	K. Doherty or Malcolm Hunt
Special (events or “one-offs”)	\$35,000** 2	Community Services	Council	K. Doherty

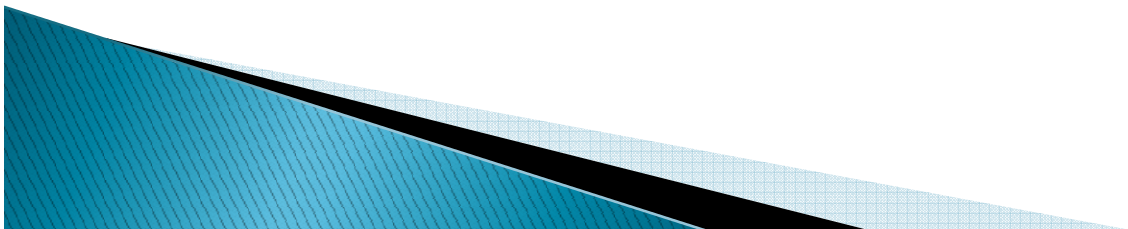
# Grants: Ineligible Applicants

- ▶ NFP's receiving other City grants
- ▶ NFP's receiving direct or indirect City support in more than 3 ways (parades, tax relief, capital funding; **we review financial statements**)
- ▶ individuals
- ▶ **for-profit**
- ▶ **political**
- ▶ **fund-raising**
- ▶ promoting specific religion
- ▶ **hospitals**
- ▶ school boards/ schools
- ▶ in legislated mandate of government
- ▶ provincial/national with no municipal branch
- ▶ **orgs with 80% funding from senior government outside the City**
- ▶ **renovations**
- ▶ capital projects
- ▶ **deficit reduction**



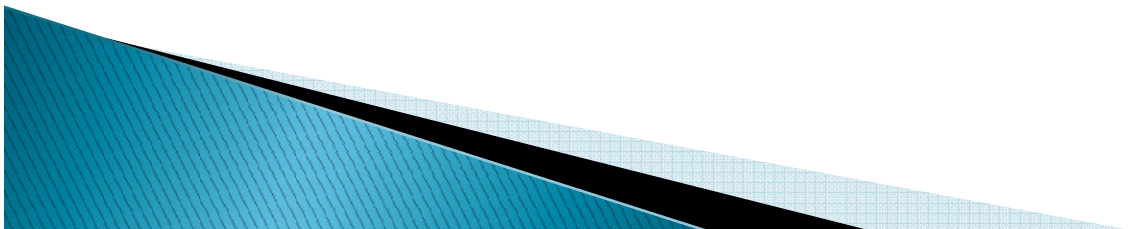
# Grants: Project

- ▶ Introduced in 2007 as **\$20,000 fund**
- ▶ **Grants of \$250 to \$1,000; up to 50%**
- ▶ Annual application process for informal groups and new organizations; competitive
- ▶ Staff review committee makes recommendations to Council
- ▶ **2013: 42 applications; 17 new; 5 ineligible; 4 withdrawn; 2 eligible, not recommended; 3 to IG**
- ▶ **\$38,852 requested; \$20,000 awarded (51.4%) Average: \$645**
- ▶ **(1 awarded a special 1 time grant of \$25,000)**
- ▶ **Trends: # of applications increasing; value of awards decreasing; average \$645**
- ▶ **Increased to \$21,000 in 2014**



# Community Project Grants

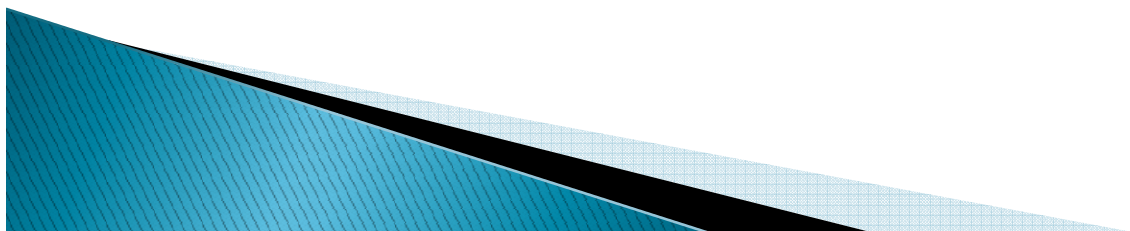
Year	# Apps	# New	Funded	Denied	Total \$	Av \$
2007	20	11 / 55%	13 / 65%	7 / 35%	\$12,000	\$923
2008	19	11 / 58%	12 / 63%	7 / 37%	\$10,750	\$895
2009	27	14 / 52%	22 / 81%	5 / 19%	\$19,350	\$880
2010	34	15 / 44%	29 / 85%	5 / 15%	\$20,000	\$689
2011	33	17 / 52%	30 / 91%	3 / 9%	\$20,000	\$667
2012	44	20 / 45%	31 / 70%	13 / 30%	\$20,000	\$645
2013	42	17 / 40%	31 / 74%	11 / 26%	\$20,000	\$645
2014	47	16 / 34%	32 / 68%	15 / 32%	\$21,000	\$656





# Project Grants by Sector

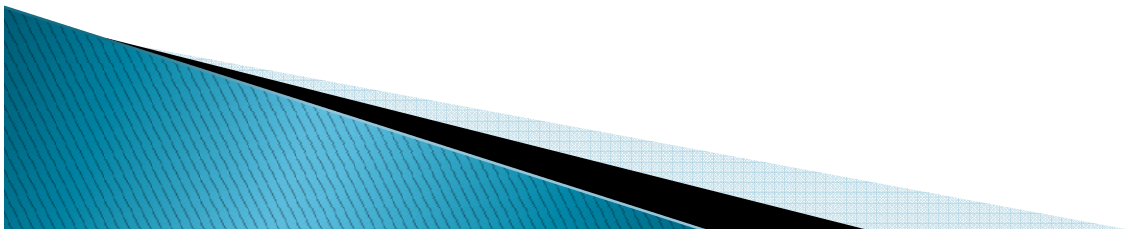
Year	Arts Culture & Heritage	Environ	Health & Social Services	Recreation	Total
2007	8/\$7,650	1/\$1,000	2/\$2,000	2/\$1,350	13/\$12,000
2008	4/\$4,000	3/\$2,500	3/\$2,500	2/\$2,000	12/\$10,750
2009	8/\$7,000	6/\$5,200	5/\$4,150	3/\$3,000	22/19,350
2010	7/\$5,600	5/\$3,650	11/\$6,200	6/\$4,550	29/\$20,000
2011	9/\$5,450	6/\$5,250	8/\$5,300	7/\$4,000	30/\$20,000
2012	7/\$4,400	6/\$4,200	11/\$7,300	7/\$4,100	31/\$20,000
2013	10/\$5,500	5/\$4,300	12/\$7,300	4/\$2,900	31/\$20,000
2014	9/\$5,050	6/\$4,900	8/\$5,450	9/5,600	32/21,000
Trend	<ing	>ing	>ing	>ing	





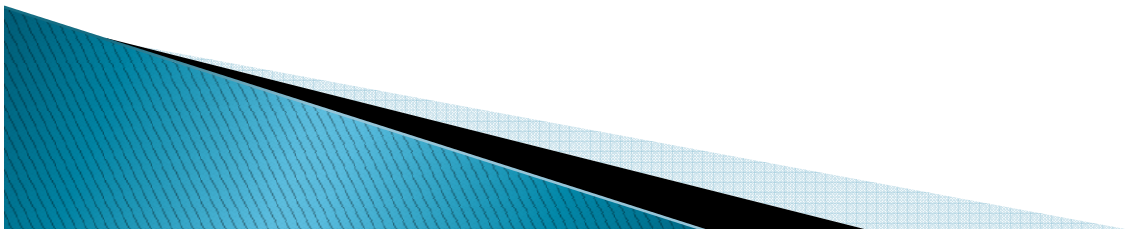
# Grants: Investment

- ▶ Longstanding funding program: **\$205,000 fund**
- ▶ **Grants \$1,000 to \$15,000; 33%; projects, programs, operating**
- ▶ Annual application **for incorporated not for profits**; new applicants must have **received 2 Project Grants**; competitive
- ▶ Can apply for 1 or 3 year funding
- ▶ Community Grant Review Advisory Committee makes recommendations to Council
- ▶ **2013: 42 applications; 3 new; 2 denied**
- ▶ **\$314,111 requested; \$205,000 awarded (65.2%)**
- ▶ **Trends: average \$5,125; slow growth; average <ing**
- ▶ **< funding to poor applications or those with least impact on local residents**
- ▶ **Increased to \$210,000 in 2014**



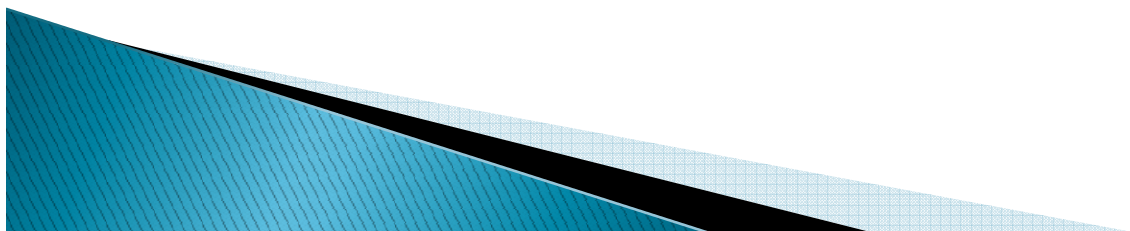
# Community Investment Grants

Year	# Apps	# New	Funded	Denied	Withdrawn	Total \$	Av \$
2007	51	5 / 10%	38 / 75%	9 / 18%	4 / 8%	\$205,000	\$5,395
2008	41	0	38 / 93%	1 / 2%	2 / 5%	\$205,000	\$5,395
2009	37	0	35 / 95%	0	2 / 6%	\$205,000	\$5,857
2010	39	0	35 / 90%	3 / 8%	1 / 3%	\$205,000	\$5,857
2011	35	1 / 3%	34 / 97%	1 / 3%	0	\$205,000	\$6,029
2012	40	4 / 10%	39 / 98%	1 / 3%	0	\$205,000	\$5,395
2013	42	3 / 7%	40 / 95%	2 / 5%	0	\$205,000	\$5,125
2014	40	2 / 5%	37 / 92%	1 / 3%	4 / 10%	\$210,000	\$5,675



# Investment Grants by Sector

Year	Arts Culture Heritage	Environ	Health & Social Services	Recreation	Total
2007	16/\$87,000	1/\$6,000	19/\$105,000	2/\$7,000	38/\$205,000
2008	15/\$95,500	1/\$7,000	20/\$95,500	2/\$7,000	38/\$205,000
2009	15/\$92,000	0	20/\$106,000	2/\$7,000	37/\$205,000
2010	16/\$100,200	0	17/\$97,300	2/\$7,500	35/\$205,000
2011	16/\$98,500	0	17/\$103,500	1/\$3,000	34/\$205,000
2012	16/\$98,500	1/\$3,000	21/\$100,500	1/\$3,000	39,\$205,000
2013	16/\$98,500	1/\$2,000	20/\$100,750	3/\$7,000	40/\$205,000
2014	16/\$109,000	2/\$6,000	16/\$87,000	3/\$8,000	37/\$210,000
Trend	= (anomaly)	>ing	= (anomaly)	>ing	



# Grants: Service

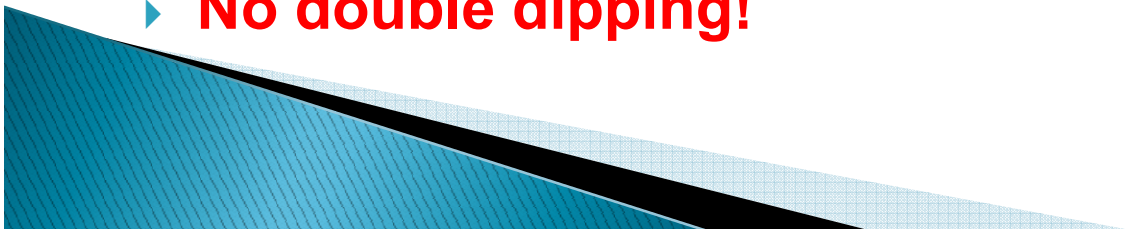
- ▶ Restricted grant program with no formal application process; generally not to exceed 25%
- ▶ **Providing a mandated service that the municipality would otherwise be expected to provide; often Municipal Capital Facilities; special relationship**
- ▶ Admission through staff recommendations/ Council approval;
- ▶ Funds approved through annual budget process
- ▶ Examples: Showplace, Canoe Museum, Little Lake Music Festival, Lions Centre; Community Care; New Canadians Centre; Peterborough Green-up
- ▶ **2013: 13 organizations, \$638,100**



	2007	2008	2009	2010	2011	2012	2013	2014
AH								
CCM	70000	70000	70000	70000	70000	70000	101400	103428
CCP	12118	12118	12118	25000	25000	25000	25500	26010
CRRC	24900	24900	24900	24900	24900	24900	25400	25908
HH	20000	20000	20000	20000	26000	26000	26520	27054
KFS	30000	30000	30000	30000	30000	3000	30600	31212
LLMF	90000	90000	100000	100000	100000	100000	102000	112000
MR								
MH			35000	35000	70000	70000	71400	72828
NCC		10900	10900	10900	20000	20000	20400	20808
PACAC	10000	10000	10000	10000	10000	1000	10200	15200
PAS				40000?	25000	25000?	0	0
PGU		105475	156300	15630	156300	156300	184426	188114
PLC					25000	25000	25500	26010
PSPC								
SP	80000	80000	80000	80000	100000	100000	102000	104040
UW								

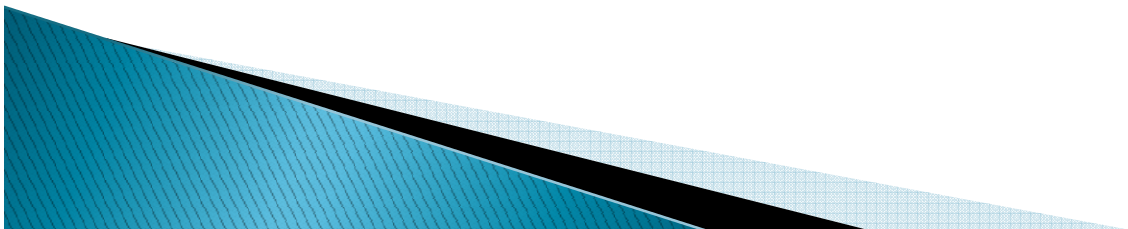
# Grants: Capital Contributions

- ▶ **Periodically the City is asked to fund major capital projects by other community partners (usually Municipal Capital Facilities)**
- ▶ Staff report requiring Council approval; often multi-year commitments
- ▶ YMCA\*: \$3m (direct and indirect)
- ▶ YWCA\*: \$750,000
- ▶ Trent DNA Cluster: \$2m
- ▶ Trent Athletic: \$1m
- ▶ Mapleridge\*: \$250,000
- ▶ Hutchison House\*: \$50,000
- ▶ Showplace\*: \$75,000
- ▶ **2012: \$250,000; \$8m Capital Levy!**
- ▶ **No double dipping!**



# Grants: 1 Time/ Special Events

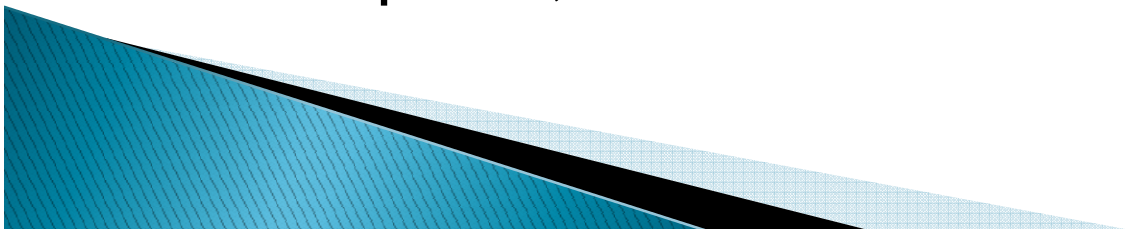
- ▶ From time to time, the City is approached to financially support significant large scale one-off special events
- ▶ **Strategic (ec impact) or self-funding**
- ▶ Staff prepare reports for Council approval for lump sum or multi-year funding
- ▶ Examples include: Lift Lock Centennial Celebrations, Imagine Peterborough/City Centennial Celebrations, Millennium Celebrations, International Plowing Match, Canada Wide Science Fair, International Dragon Boat Race, Olympic Torch Relay, **Hockey Day in Canada, Stompin' Tom**
- ▶ **2012: \$10,000 to Trent Valley Archives**
- ▶ **2013: \$25,000 Kawartha Village Co-op; \$10,000 Community Care move**





# Loans/ Tax Receipts

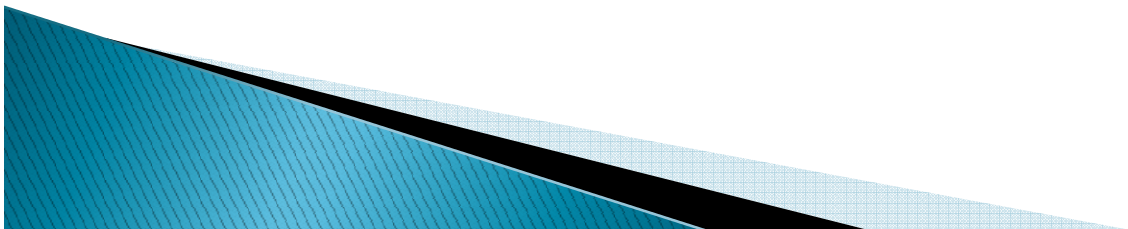
- ▶ Interest bearing loans to project partners
- ▶ **If project is in community interest and project partner is not a registered charity, the City can receive funds and issue tax receipts if the project is deemed by Council to be in community interest**
- ▶ City has to **control release of funds** to ensure they are expended for purpose collected
- ▶ E.g. Lawn Bowling Club, Rugby, Market Hall, Showplace, Lions Centre



# Advice

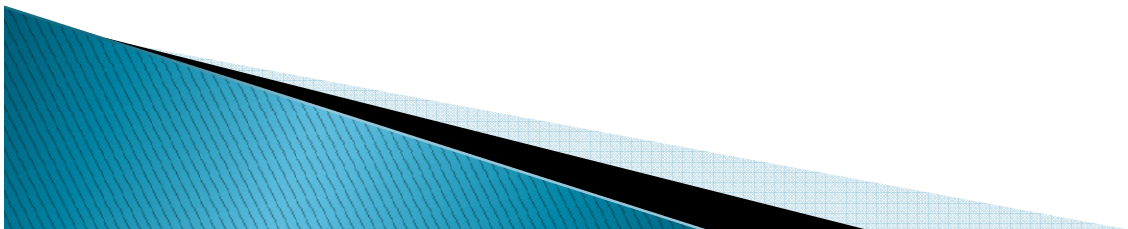
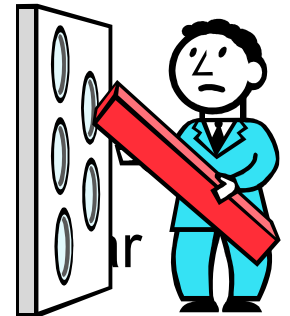


- ▶ **Self assessment first:**
- ▶ Do you really **need** the funding? (surplus/ deficit)
- ▶ Can you generate **earned revenue** from any of your programs or services? (sales, admissions, sponsorships)
- ▶ Can you generate surplus revenues through **fund-raising** (donations, special events, volunteerism...)



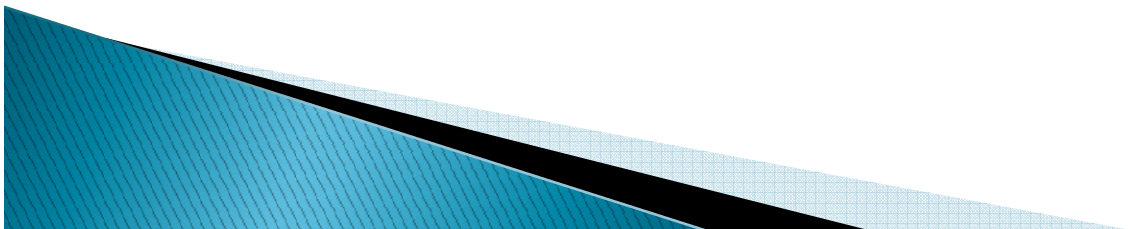
# Advice

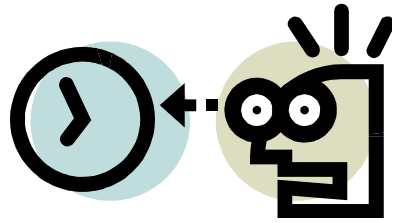
- ▶ Then do your **research** for government funding: (federal, provincial, municipal) (**Townships not County!**)
- ▶ **Don't go political first!**
- ▶ Print off hard copy of instructions and application
- ▶ Look at **eligibility** and **fit**
- ▶ Identify **key words** and phrases that grantor needs to (Highlight)
- ▶ Don't try to make application fit you; you must fit it
- ▶ **But, avoid “mission drift”**
- ▶ **BEST grant writer!!!!**
- ▶ Talk to staff; ask for advice and direction
- ▶ **Develop relationship**



# Advice

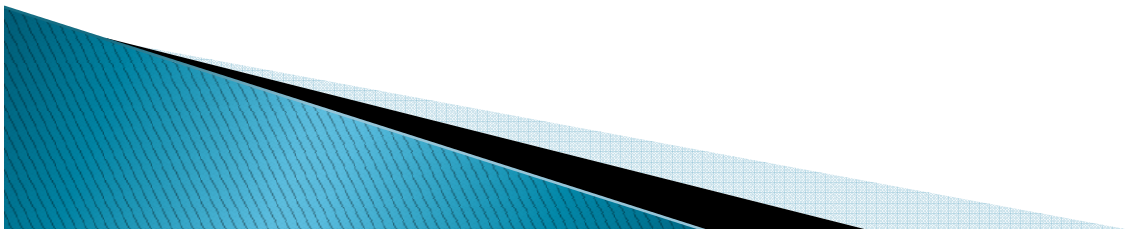
- ▶ Financial statements
- ▶ Audited Statement
- ▶ Notice to Reader
- ▶ Review Engagement
- ▶ >trust
- ▶ =investment





# Advice

- ▶ Give **specific** information: names of partner organizations; number of attendees/ clients
  - ▶ Develop realistic and reliable **performance measures**
  - ▶ **Realistic request; demonstrating need**
  - ▶ Hone & refine
  - ▶ Don't leave it until the last minute (**Murphy's Law**)
- 
- ▶ Don't miss the **deadline**, even by minutes
  - ▶ Partial submission?
  - ▶ **Cover Letters?**
  - ▶ **Respect** Grantor's process
  - ▶ If unsuccessful get **feedback**





City of Peterborough  
Community Services  
Department

Contact:

742-7777 ext 1822