

To: Finance Committee

From: Stephanie Sinnott, Commissioner,
Finance Services

Report Number: FIN-22-54

Date of Report: May 11, 2022

Date of Meeting: May 16, 2022

Subject: City of Oshawa Community Grant Program

Ward: All Wards

File: 03-05

1.0 Purpose

On October 25, 2021, Council reviewed Report FIN-21-102 as related to FIN-21-60 concerning Financial Support Programs Provided by the City of Oshawa (Attachment 1) and adopted the following recommendations:

1. That the updated City of Oshawa Financial Support Program as outlined in Report FIN-21-60, dated June 9, 2021 be adopted; and,
2. That the updated program come into effect for the 2023 Budget; and,
3. That the current financial support programs as outlined in Section 5.3, Table 3, be eliminated and replaced by the updated program; and,
4. That correspondence FIN-21-17 (which can be found at http://app.oshawa.ca/agendas/Finance/2021/2021-03-22/CORR_FIN-21-17.pdf) from the Canadian Automotive Museum be received for information and be removed from the Finance Committee's Outstanding Items report.

The report also indicated that staff will establish a grant committee and for that committee to establish the criteria and process that will be used to evaluate and score grant applications and report back to Committee and Council for approval of the criteria.

The purpose of this report is to present the Evaluation and Scoring Criteria for the new City of Oshawa Community Grant Program for Council's consideration and approval.

2.0 Recommendation

That the Finance Committee recommend to City Council:

That pursuant to Report FIN-22-54 dated May 11, 2022, concerning the City of Oshawa Community Grant Program, the Evaluation and Scoring Criteria be adopted effective for the 2023 budget process.

3.0 Executive Summary

Not Applicable

4.0 Input From Other Sources

Community Grants Committee

Other Municipalities

5.0 Analysis

5.1 Background

The City of Oshawa provides significant support for various community groups and organizations through a variety of financial support programs. A review of these programs determined that the programs were difficult to apply for, the awarding of grants was inconsistent, and the program itself required substantial staff resources and Council review and needed modernization.

A new financial support program was developed as four (4) distinct grant streams to fund not-for-profit community initiatives in such areas as: Arts, Culture, Heritage and Environmental - Events, Arts, Culture and Heritage – Cultural Development Projects and Special Initiatives; Strong Inclusive Communities initiatives, and Fundraising for registered not-for-profit organizations.

The Finance Committee directed staff, through recommendations approved by Council and detailed in Report FIN-21-60 and Report FIN-21-102 to prepare a follow-up report outlining evaluation and scoring criteria for the new City of Oshawa Community Grant Program

At the October 27, 2021, meeting of the Finance Committee Report FIN-21-102 regarding the review of Financial Support Programs provided by the City of Oshawa, the Committee approved the recommendation for an updated City of Oshawa Financial Support Program to come into effect in 2023

The approved new financial support program detailed in the report eliminated and replaced the City's previous programs.

The new program will award financial and/or in-kind support to community organizations under four categories and will be administered by a cross-functional committee of City staff using a defined selection and Council approved evaluation criteria.

5.2 Community Grants Committee

The staff committee was formed and is made up of a representative from each of the following branches:

- Corporate Strategic Initiatives – Committee Chair
- Clerks
- Corporate Communications
- Economic Development
- Finance
- Fire
- Innovation & Transformation
- Legal
- Municipal Law Enforcement & Licensing Services
- Operations – Parks
- Recreation – Cultural Development
- Recreation – Special Events
- Strategic Business Services – Traffic

The committee reviewed the categories approved and developed descriptions for each grant category that will provide clarity for applicants and residents. The recommended descriptions are outlined in the following sections.

5.3 ARTS, CULTURE, HERITAGE and ENVIRONMENTAL – EVENTS

Purpose of the grant:

This grant program supports the development and delivery of events, festivals, celebrations and gatherings in Oshawa.

This grant supports:

Festivals, events and gatherings that strengthen and develop the arts, culture, heritage, and environmental sectors through the provision of free programming for Oshawa residents

Eligible projects include:

- Events
- Festivals
- Celebrations
- Gatherings

Eligible activities must:

- Be open to the public but specifically Oshawa residents
- Be free to all participants

Financial Information:

Funding envelope = \$100,000

There is a declining eligibility amount over 4 years for applicants to this grant (100%, 75%, 50%, 25%)

Who is eligible to apply?

Not-for-profit organizations, community groups, collectives.

**5.4 ARTS, CULTURE, HERITAGE, and ENVIRONMENTAL – DEVELOPMENT
PROJECTS AND SPECIAL INITIATIVES**

Purpose of the grant:

This grant program supports the development and presentation of one-off activities, projects, and initiatives within the arts, culture, heritage and environmental sectors. Applicants may request funding towards communication and marketing expenses that occur as part of the proposed project

This grant supports:

One-off projects and activities that enhance the arts, culture, heritage and environmental sectors in Oshawa.

Eligible projects include:

- Art projects in any discipline, including dance, literary, media arts, music, theatre, and visual art
- Education and public programming with arts, culture, heritage or environmental themes
- Environment preservation projects
- Cultural development projects

Eligible activities must:

- Include a public presentation component, to ensure works will increase access and learning opportunities for residents and visitors
- Be free to all participants

Financial Information:

- Funding envelope = \$50,000

Who is eligible to apply?

Not-for-profit organizations, community groups, collectives.

This program does not fund:

Projects that are eligible for funding under the 'Arts, Culture, Heritage and Environmental – Events' grant stream, including events, festivals, celebrations and gatherings, are not eligible under this grant program.

5.5 STRONG INCLUSIVE COMMUNITIES

Purpose of the grant:

This grant program supports community initiatives which are focused on supporting the needs of local Oshawa residents from diverse communities.

This grant supports:

- Initiatives that support healthy, safe, and inclusive community development

Eligible projects include

Projects and initiatives that support community needs and social equity goals, which may include:

- Education and awareness campaigns or programming
- Food drives, food bank activity or community gardens
- Support services for various diverse communities
- Housing and shelter for diverse communities

Eligible activities must:

- Provide support to communities or individuals in Oshawa.
- Be free to all participants

Financial Information:

Funding envelope = \$100,000

Who is eligible to apply?

Not-for-profit organizations or community groups whose mandate is to support local Indigenous communities and/or equity deserving groups and community members in need.

This program does not fund:

Capital Infrastructure

5.6 FUNDRAISING EVENTS

Purpose of the grant:

This grant program will provide in-kind service support for fundraising events held within the City of Oshawa.

This grant supports:

In-kind services for utilizing Oshawa facilities/spaces for general fundraising events that support charitable organizations, including:

- Facility rental fees
- Equipment Rentals
- Road Closures
- Other City support

Eligible projects include

- Events
- Festivals
- Celebrations
- Gatherings

Financial Information:

- Funding envelope = \$50,000
- All funds raised must go directly to a registered charitable organization
- Only provides in-kind support

Who is eligible to apply?

Incorporated not-for-profit organizations

5.7 Evaluation and Scoring Criteria

The committee also developed criteria to govern the evaluation and scoring of applications received and applied weighting to each evaluation criteria as outlined below.

The applicants are scored on a scale from 1 to 5 in the following categories.

Organization Capacity: 10%

- Does the applicant have a clear organizational structure?
- Does the applicant have credibility for this kind of work?
- Is the program, service or event as proposed aligned with the mandate of the organization?
- Did they provide a letter of reference?
- Is the content of their application well organized, logical in progressions and are the guidelines of the application followed?
- Does the applicant's values support inclusion, non-discrimination and anti-racism?

Proposed Project Scope: 20%

- Are the proposed methods, approaches and strategies realistic, reasonable, effective, outcome-based and drawing on best practices and latest thinking/research?
- Is the event achievable and realistic? Will alternate sources of funding be pursued or legacy components created from it?

Program or Service Plan: 20%

- Is there sufficient planning, and do the timelines make sense for event implementation?
- Has an intended audience been identified?
- Are task, timelines and outcomes clear and measurable?
- Does the proposal include partnerships or a collaborative approach to serving the particular need of the project? With whom?

Budget: 20%

- Is the budget logical and reasonable?
- Can the project be successful if partially funded?
- Have funds been requested from other sources?
- Are there in-kind contributions or matches (i.e. funding, staffing, equipment, etc.) included from the organization? Contributor and amount/ in kind to be listed.

City of Oshawa focus: 30%

- Is there a direct link between the proposed event or project and one or more of the City's plans and/or strategies? For example, the Oshawa Strategic Plan, the Culture Counts Plan, the City's Diversity and Inclusion Plan or other directive/priorities of Council?
- Does it benefit an Indigenous community and/or an equity deserving group?
- Does it address a community need?
- Does the project serve Oshawa residents at an appropriate scale?

Process:

Scores are tabulated and each reviewer is also asked the following:

- What is their recommendation for the project (i.e. full support, partial support, or no support)?
- If partial support, how much?
- Are there any amendments they would like to see in the application?

Once the Community Grants Committee members have completed their scoring, the committee will meet to discuss why they scored the application the way they did and go over their notes. The committee reviews the top ranked applications first and discuss funding amounts and determine what funding remains available for other applicants. The committee reviews application budgets, looks for areas for savings, recommends event be scaled down, etc., Once there is consensus, the committee will award the grants and notify the applicants on the status of their request.

The Community Grants Committee, through Finance, will report the results to Council in advance of following year's budget process.

Once Council has considered and approved the evaluation and scoring criteria, the Community Grants Committee will continue to develop a communications plan to bring awareness of the new grants program to potential applicants and the general community.

6.0 Financial Implications

There are no financial implications from the development of the evaluation and scoring criteria exercise. The grants that will distributed from the Council approved annual budget.

7.0 Relationship to the Oshawa Strategic Plan

The financial support programs address the Oshawa Strategic Plan goals of Social Equity, Cultural Vitality and Accountable Leadership.

A handwritten signature in black ink, appearing to read 'S. Sinnott', written in a cursive style.

Stephanie Sinnott, Commissioner,
Finance Services

Item: FIN-21-102

Finance Committee – October 18, 2021

Supplemental Information on the City's Grant Program Update (FIN-21-60)

That the Finance Committee recommend to City Council:

Whereas, at the October 27, 2016 meeting of the Finance Committee Report FIN-16-91, concerning the review of Financial Support Programs provided by the City of Oshawa was referred to a special meeting of the Finance Committee to be held during the month of November 2016. The special Finance Committee meeting did not take place; and,

Whereas, at the May 31, 2018 meeting of the Finance Committee, Report FIN-18-36 concerning the City's Anchor Grant Program was referred to a non-statutory public meeting of the Finance Committee be held in 2019 to review the financial support programs offered by the City; and,

Whereas, on September 26, 2019 at a special meeting of the Finance Committee Report FIN-19-67, concerning 2019 review of Financial Support Programs provided by the City of Oshawa, was considered and public feedback was also received at this meeting. The Finance Committee referred back the item to staff for a follow-up report that considers the input from the public; and,

Whereas, at the June 14, 2021 Finance Committee meeting, Report FIN-21-60 concerning the financial support programs by the City of Oshawa, responding to the direction of September 26, 2019, this report was deferred until the September 2021 Finance Committee meeting; and,

Whereas, at September 20, 2021 Finance Committee meeting Report FIN-21-60 was deferred to the next meeting of Finance Committee to allow for public input; and,

Whereas, a synopsis of the new support program and procedure as outlined in Attachment 1 was posted on the City's website from September 24 to October 7, 2021 for public input; and,

Whereas, two pieces of correspondence were received from the public with positive feedback on the redesign of the City's grant programs, as outlined in FIN-21-60, and provided the following suggestions for the program:

- Could the grant program consider providing operating grants
- Could the grant program consider an additional category related to Environment/Environmental

Whereas, Report FIN-21-60 outlines a process that once the format of the program is approved that staff will establish the criteria and evaluation process for Council approval. Through the process the public input will be taken into consideration; and,

Whereas, the additional public input component of the process did not yield improvements to the structure of the program;

Therefore be it resolved:

1. That the updated City of Oshawa Financial Support Program as outlined in Report FIN-21-60, dated June 9, 2021 be adopted; and,
2. That the updated program come into effect for the 2023 Budget; and,
3. That the current financial support programs as outlined in Section 5.3, Table 3, be eliminated and replaced by the updated program; and,
4. That correspondence FIN-21-17 (which can be found at http://app.oshawa.ca/agendas/Finance/2021/2021-03-22/CORR_FIN-21-17.pdf) from the Canadian Automotive Museum be received for information and be removed from the Finance Committee's Outstanding Items list.

The City of Oshawa provides significant support for various community groups and organizations through a variety of financial support programs. A review of these programs determined that the programs were difficult to apply for, the awarding of grants was inconsistent, and the program itself required substantial staff resources and Council review and needed modernization.

Staff have recommended that the current programs for Anchor Grants, Partnership Grants, Waiving of Fees and Financial Assistance be eliminated and are proposing a new program with four categories:

1. Arts, Culture and Heritage Events – funds to host a free and innovative gathering or event with elements associated with education, public awareness, information/resource sharing, and/or capacity development. (proposed funding of \$100,000)
2. Arts, Culture and Heritage – Cultural Development Projects and Special Initiatives – one time funding to cover costs associated with a project or special initiative that supports cultural development in Oshawa. (proposed funding of \$50,000)
3. Strong Inclusive Communities – funds to support initiatives/events that directly assist residents in need such as foodbanks, food drives, social services, housing, etc. (proposed funding of \$100,000)
4. Fundraising Events – in-kind services for the use of Oshawa facilities/spaces for general fundraising events (proposed funding of \$50,000)

The new program, if approved, will include a cross functional grant committee of staff members from across the organization. This ensures a multi-faceted review of the applications, ensuring the equitable allocation of funds and/or in-kind services. Once established, this committee will determine the criteria and process that will be used to evaluate the applications. The recommended deadline for applications is January 31. Following Council approval of the annual budget, the application evaluation process and allocation of funds will take place.

The City of Oshawa would like to hear your thoughts on proposed program.