

Lessons Learned Implementing the Strategic Plan Grant Process

Purpose

- **Outline lessons learned from the Strategic Grant program implementation**
- **Seek Council direction on potential changes to the policy before the 2016 intake, scheduled to launch in September 2015**

Original Grant Programs

Grants for organizations that provide service on behalf of the City

Five programs with competitive application processes:

- Festival Investment \$156,000
- Neighbourhood Enhancement \$30,000
- Greenways \$25,000
- Community Arts \$30,000
- Sustainability \$86,000

One program without competitive process

- Fee-for-service \$513,000

New Approved Programs

- **Direct-award grants** (organizations that provide service on behalf of the City)
- **Strategic Plan grants**
- **Micro grants**
- **Community garden volunteer coordinators**
- **Fee-for-Service grants remained unchanged for 2015, but to be discontinued for 2016**
- **Festival Investment grants remained unchanged**

Strategic Plan Program Objectives

Based on research of other municipalities and taking public input into account:

- **Flexibility**
 - Broader scope to allow grant awards to organization that best assist in achieving City's strategic objectives
 - One funding envelope to avoid historical undersubscription of some grant programs
- **Consistency and opportunity**
 - Consistent application, evaluation and reporting back process
 - New applicants
 - Earlier approval
- **Council involvement and oversight in the award of grants**
 - Applicants present requests to Council; Council determines merit
 - Formal reporting back before following year's grant awards

Lessons Learned

What worked well:

1. Separating direct-award grants from competitive grants
2. Inviting new applicants to apply
3. Having consistent application and evaluation criteria
4. Staff involvement was objective
5. Earlier approvals (future years)
6. No program was undersubscribed
7. More Council involvement and oversight
8. Micro-grants and Community Garden Volunteer Grants

Potential Improvements

Scope and eligibility

- Require applicants to achieve a stated strategic plan outcome
- Reduce the number of eligible categories

Art grants

- Reduce eligibility to only those organizations that do not fit under the CRD's Art Fund
- Redirect all festival applications to the Festival Investment Grant process

Potential Improvements

Limits

- One-time projects only; no ongoing operating funding
- Projects that benefit City of Victoria residents only, not Greater Victoria
- Reduce the cap for project grants to 50%
- Maximum award amount
- Cap on number of applications per organization
- Require grant requests to be related to "taking action" in the community
- Grant requests related to a senior level of government responsibility ineligible

Potential Improvements

Public Space

- Redirect applications to neighbourhood/placemaking funding stream

Application Form

- Who and how many will benefit
- How much of total project cost is being requested
- Identifying and providing proof that other funding is confirmed or pending
- Link to strategic outcome, not just objective

Potential Improvements

Over-subscription process

- Reduce all grants proportionately
- Reduce limits imposed by the policy
- Allocate available budget equally between strategic objective
- Rate and prioritize grant requests

Potential Improvements

Decision-making process

- Evaluation criteria summary
 - Name and short description of request
 - Strategic outcome link
 - Amount requested and eligible amount
 - Percent of total project cost requested
 - Other funding sources confirmed or pending
 - How many will benefit

Potential Improvements

Decision-making process

- Options for fitting requests within allocated budget
 - Reduce the cap imposed by the policy
 - Reduce all applications proportionately
 - Reduce the maximum award amount imposed by the policy

Recommendations

Direct staff to bring forward amendments to the grant policy to implement the following changes:

1. Require that applicants demonstrate which strategic outcome their project will achieve
2. For arts applications, reduce the eligibility to only those organizations that do not fit under the CRD's Art Fund
3. Redirect all festival applications to the Festival Investment Grant application intake
4. Implement the following limits:
 - a. Only fund one-time projects; provide no ongoing operating funding
 - b. Only fund projects that primarily benefit City of Victoria residents, not Greater Victoria
 - c. Reduce the cap for project grants from 75% to 50% of total project cost
 - d. Implement a maximum award amount of \$25,000
 - e. Require that grant requests be related to "taking action" in the community and provide clear direction to staff as to what this means
 - f. Allow only one strategic plan grant application per organization

Recommendations

5. Redirect projects that impact public space to a separate participatory neighbourhood funding stream
6. Improve the application form and asking applicants to:
 - a. Outline who will benefit from the project
 - b. Outline how much of the project cost is being requested
 - c. Identify and provide proof whether other funding sources have been confirmed or are pending
 - d. Outline which strategic outcome the project would achieve
7. Establish a process for addressing situations where grant requests exceed available funding:
 - a. Staff will provide options for reducing the cap imposed by the policy to a percentage that will fit the available funding.