

HRM Special Events Advisory Committee

ORIENTATION

Prepared: June 2011

Chris Newson, Legislative Assistant

Paul Forrest, Coordinator, Civic Events

Table of Contents

1.	History	3
2.	Role of the Special Events Advisory (SEAC).....	3
3.	Funding Sources	3
4.	Summer Festival Grant Program	4
5.	Festival & Events Grant Program	5
6.	Annual Event Grant Program	5
7.	One Off Grant Program.....	6
8.	Event Infrastructure	6
9.	Common Concert Program.....	6
10.	Hallmark Event Grant Program.....	6
11.	Grant Application / Review Process	7
12.	Presentations to the Special Events Advisory Committee	8
13.	HRM Delivered Events	8
14.	Supporting Documentation	8

1. **History**

The Special Events Advisory Committee (SEAC) was created by Halifax Regional Council on March 27, 2007. The Committee was created to review grant applications and make recommendations to Regional Council based upon evaluation criteria provided in the Civic Events Policy Framework as approved by Regional Council on March 27, 2007.

2. **Role of the Special Events Advisory (SEAC)**

The HRM Special Events Advisory Committee shall review, evaluate and make recommendations to Regional Council in regard to the allocation of the annual Special Event Reserve, Festivals & Events Grants and the Summer Festival Grants pursuant to the HRM Civic Events Policy Framework with support from staff of the Community Relations and Events Division of the Community Development Department.

The evaluations of Festivals & Events Grant and Summer Festival Grant applications will be based upon the operational framework for events designed around community development (festivals, celebrations and civic events).

The evaluation of Hallmark Events and Non Annual Event Grant applications will be based upon the operational framework for events designed around economic and tourism development (commercial, tourism, sporting and significant celebrations) outcomes.

The Special Events Advisory Committee will also review eligibility criteria, priorities, policy and procedures for assistance under the respective programs and services managed under the auspices of the HRM Special Events and Festivals & Events Grants portfolio.

3. **Funding Sources**

Funding for the various grants awarded comes from the following two areas:

(a) **HRM Core Operating Budget for Civic Events (C760).**

Three grant programs have been established under the HRM Core Operating Civic Events budget (C760), although only two of the programs are reviewed by the Special Events Advisory Committee, to support community-based events delivered by non-profit organizations, they are:

Summer Festival Grant Program; (total budget of \$25,000)

Grant applications to this program are reviewed by Civic Event staff and a Sub-Committee of the Special Events Advisory Committee with a recommendation then forwarded to the Special Events Advisory Committee for review and recommendation to Regional Council for final approval.

Festival & Events Grant Program; (total budget of \$25,000)

Grant Applications to this program are reviewed by Civic Event staff and, until recently, a Sub-Committee of the Special Events Advisory Committee with a recommendation then forwarded to the Special Events Advisory Committee then to Regional Council for final approval. In May 2011, the Special Events Advisory Committee agreed to discontinue the practice of appointing a Festival & Event Grant Program Sub-Committee and have staff provide a report directly to the Special Events Advisory Committee for review and recommendation to Regional Council for final approval.

Annual Event Grants Program; (total budget of \$60,000)

The Annual Event Grant Program does not require review by the Special Events Advisory Committee as these grants are assigned during HRM's annual operating budget process to support annual events conducted by external event organizers. Examples of annual events under this program are: Word on the Street, Multicultural Festival, Atlantic Fringe Festival, Sackville Patriot Days, Kaloose Days, Eastern Passage Cow Bay Summer Carnival, Waverley Gold Rush Days, Clam Harbour Sand Castle Competition, Dartmouth Tree Lighting, Book Awards, Halifax Pride Parade, Spryfield Santa Clause Parade, Holiday Parade of Lights, Light Up Bedford Parade and Bedford Days.

(b) HRM Marketing Levy Reserve (MLSER) (Q315)

The Marketing Levy Special Events Reserve (MLSER) focuses on national or international sport, culture and tourism events that do not occur annually as well as Hallmark Events. MLSER also supports anniversaries, commemorations, the Common Concert Program, and the Event Infrastructure Program.

The total budget for MLSER is approximately \$330,000 (based on 2009 figures).

The funding for the MLSER comes from the 40% portion of the 2.0% marketing levy imposed on the purchase price of accommodations within HRM. The remaining 60% of the Marketing Levy is provided to Destination Halifax to plan, coordinate and deliver sales and marketing strategies necessary to drive leisure and business tourism into HRM.

By-Law H-400 Respecting the Marketing Levy outlines the municipality's authority with respect to the Marketing Levy.

4. Summer Festival Grant Program

The Summer Festival Grant program is intended for community events that are geographically located within the former Halifax County Municipal boundaries. The events are recurring, supported financially by corporate and community sponsors, and involve multiple free activities accessible to the general public. Traditionally, the grant

has been awarded in its entirety to one community, however; the grant may be divided between several communities.

The total budget is \$50,000 from the HRM Operating Budget for Civic Events (C760) with \$25,000 awarded annually to community events and \$25,000 to the Halifax County Exhibition.

A Sub-Committee of the Special Events Advisory Committee is formed to review the applications and make recommendation to the Committee which the Committee would then endorse with or without amendment(s) and forward to Regional Council for final approval.

Examples of Summer Festivals are: Beaver Bank Canada Day, Fall River Canal Days, Sambro Sou' Wester Days.

5. Festival & Events Grant Program

The Festival & Event Grant program provides financial support for community non-profit organizations for new, recurring and annual small scale community events. These events are traditionally community led. The grant range is \$250 to \$3,500 (in 2009 figures).

The total budget for this program is \$25,000 from the HRM Operating Budget (C760) with an additional \$10,000 provided by the Province of Nova Scotia.

Examples of Festival & Events are as follows: Musquodoboit Lion's Summer Fair, Dartmouth Mother Goose Festival, Dingle Beach, Cole Harbour Harvest Festival, Eastern Passage Seaside Festival, North Preston Community Day & Festival, St. Margaret's Bay Canada Day Festival, Sackville Christmas Tree Lighting, Ward 5 Block Party

6. Annual Event Grant Program

The Annual Event Grant Program provides funding for regional-scale community and cultural events. This program does not require review by the Special Events Advisory Committee as these grants are assigned during HRM's annual operating budget process to support annual events conducted by external event organizers.

Total budget is approximately \$60,000 from Operating Budget (C760).

Examples of these events are: Holiday Parade of Lights, Word on the Street, Greek Fest, Spryfield Santa Clause Parade.

7. One-Off Grant Program

This program provides financial support for non-annual major events that qualify for funding through the remainder of the MLSER (Market Levy Special Event Reserve) fund after the Hallmark Events have been budgeted.

The grant range varies with the 2010 range being from \$1,500 to \$145,000.

8. Event infrastructure

Funding for event infrastructure may be provided from the MLSER (Q315) fund.

9. Common Concert Program

The Common Concert Program is a fund that offsets the cost of services related with hosting major concerts so as to ensure HRM is attractive and competitive. The concerts are to have internationally recognized artists/groups and sell a minimum of 30,000 tickets and are expected to be a large economic and tourism driver. The maximum value of contribution is \$100,000.

The total budget is approximately \$200,000 (in 2010 figures).

Examples of the Common Concerts are as follows: Rolling Stones, Paul McCartney, Black Eyed Peas, Keith Urban.

10. Hallmark Event Grant Program

The definition of a Hallmark Event is a recurring event possessing such significance in terms of tradition, attractiveness, image or publicity that it provides the host community with a competitive advantage. Hallmark Events are associated with HRM's identity and are events that will help raise HRM's profile globally and position HRM as a place to invest. Over time, the event and destination (HRM) can become inseparable in terms of their image (i.e.: Tall Ships, Halifax International Busker Festival, Royal Nova Scotia International Tattoo).

An event may only be considered for Hallmark status by one of the following means:

- a) Regional Council motions (requests) the Special Events Advisory Committee to consider an event for Hallmark Status;
- b) a member of the Special Events Advisory Committee motions (requests) to consider an event for Hallmark status.

Once consideration for Hallmark status is approved, the event organizer(s) would be requested to submit an application to commence the formal review process including a presentation to the Special Events Advisory Committee. A report would then be forwarded to Regional Council recommending or not recommending Hallmark status.

Once Hallmark Event status has been obtained, Hallmark Events receive annual funding without a re-application process, however; an annual presentation to the Special Events Advisory Committee would be required. 80% of the awarded grant funding is provided upfront with the remaining 20% provided upon receipt and approval by HRM Civic Events staff of the Hallmark Event's year end report.

Hallmark Events receiving over \$5,000 must present to the Special Events Advisory Committee before the end of the fiscal year. Hallmark Events are funded through the MLSER with funding levels subject to the Special Events Advisory Committee and Regional Council approval.

Existing Hallmark Events may only be considered for removal from the program for one of the following reasons; the event:

- a) does not take place
- b) is determined to no longer satisfy the definition and intent of the policy
- c) leaves the HRM region.

Hallmark Event grants currently range from \$10,000 to \$90,000.

Examples of Hallmark Events are as follows: Atlantic Film Festival, Blue Nose International Marathon, Halifax International Busker Festival, Halifax International Jazz Festival, Halifax Pop Explosion, Halifax Pride Festival, Royal Nova Scotia International Tattoo, SEDMHA (Shearwater East Dartmouth Minor Hockey Association) International Hockey Tournament, Scotia Festival of Music.

11. Grant Application / Review Process

There are two intake processes for all HRM event granting; the first intake process begins the last Friday of October and closes the last Friday of January. The second intake process begins the last Friday in June and closes the last Friday in August. All information and application forms are available on the HRM website.

- Step One: Candidates submit an application to HRM Civic Event staff.
- Step Two: HRM Civic Event staff review the applications for eligibility and whether the proposal qualifies for a specific grant program as per the Civic Event Policy Framework.
- Step Three: HRM Civic Event Staff prepare a report for the Special Events Advisory Committee that recommends or does not recommend a proposed grant award.
- Step Four: The Special Events Advisory Committee reviews all material provided by staff as well as any presentations by Event Organizers then makes their decision based on the criteria outlined in the Civic Events Policy and the Criteria Score Sheet provided by staff.

At this stage, the Committee may take one of the following three courses of action:

-
- a) approve the proposed grant award as recommended by staff;
 - b) propose an increase to the recommended grant award;
 - c) propose a decrease to the recommended grant award.

Step Five: The Special Events Advisory Committee would then submit their final decision in report format to Regional Council for final approval.

12. Presentations to the Special Events Advisory Committee

Once a written request to present to the Special Events Advisory Committee has been received and reviewed by HRM Civic Event Staff in regard to eligibility, the Special Events Advisory Committee will be advised of the request to present. The presentation will then be placed on an upcoming meeting agenda with a maximum of five presentations permitted per meeting.

Presentations are to:

- a) be relevant and timely;
- b) deal with only one topic;
- c) have a maximum of two presenters per topic;
- d) enable each presenter to speak for a maximum of 3.5 minutes: when only one speaker, the maximum time permitted is 7 minutes.
- e) be followed by a Question and Answer period, maximum 10 minutes, for questions of clarification only by members of the Special Events Advisory Committee. **No debate** on the subject matter of the presentation is to occur at this time.

Once a Presentation has been given, a Presentation on substantially the same matter shall not be received again for a period of three months from the date of the first hearing.

Following the presentation, the Presenter is to be advised that they will be notified of the Committee's decision following all presentations and that the final decision rests with Regional Council.

13. HRM Delivered Events

Regional events that are commemorative in nature, or linked to corporate/strategic priorities and outcomes are delivered directly by HRM Civic Event Staff and/or in association with a Committee. Most of the events were identified at amalgamation and were grandfathered, however; additions have been made since (i.e.: tree lighting and fire festival).

14. Supporting Documentation

1. Terms of Reference for the Special Events Advisory Committee

-
2. Civic Event Policy Framework (2007) – Attachment 1 of the March 23, 2007 Regional Council report
 3. Marketing Levy Special Events Reserve - Reserve Business Case – Attachment 2 of the March 23, 2007 Regional Council report.
 4. HRM By-Law H-400 Respecting the Marketing Levy
 5. HRM Special Events Reserve Criteria / Score Sheet

Special Events Advisory Committee Terms of Reference

Approved March 27, 2007

Amended April 1, 2008

Amended March 24, 2009

Amended November 30, 2010

MANDATE

The HRM Special Events Advisory Committee shall review, evaluate and make recommendations to Regional Council regarding the annual Special Event Reserve, Festivals & Events Grants and the Summer Festival Grants with the support from staff of the Community Relations and Events Division of the Community Development Department.

STATEMENT OF PURPOSE

Pursuant to the HRM Civic Events Policy Framework, members of the HRM Special Events Advisory Committee will evaluate applications for the Special Event Reserve, Festivals and Events Grants and the Summer Festival Grants using an operational framework for events designed around “community development” versus “economic and tourism development” outcomes.

Under “community development outcomes” (Festivals & Events Grants and the Summer Festival Grants) the strategic focus will be on festivals, community celebrations and civic events and under “tourism and economic development outcomes” (Special Events Reserve) the focus will be on commercial, tourism, sporting and significant celebrations.

1. COMPOSITION OF COMMITTEE

- 1.1 The HRM Special Events Advisory Committee shall comprise a voting membership, totalling eleven (11) as follows:
 - 1.1.1 Five (5) elected members of Halifax Regional Council representing the urban, suburban and rural areas of the Halifax Regional Municipality;
 - 1.1.2 One (1) member from the Greater Halifax Partnership;
 - 1.1.3 One (1) member from the Hotel Association of Nova Scotia;
 - 1.1.4 One (1) member from the Chamber of Commerce;
 - 1.1.5 One (1) member from Destination Halifax, and
 - 1.1.6 Four (4) members at large.
- 1.2 The representatives of Regional Council shall be appointed by the Audit and Finance Standing Committee and shall inform Regional Council of their selection.
- 1.3 The members-at-large shall be appointed by the Audit and Finance Standing Committee and shall inform Regional Council of their selection..
- 1.4 The Chair may be elected representative or a citizen member and shall be selected annually by the voting members of the HRM Special Events Advisory Committee.

The Chair shall have one (1) vote.

2. TERM OF OFFICE

- 2.1 Each elected representative shall be appointed for a term of two (2) years, renewable.
- 2.2 Four community representatives shall be appointed for a term of two (2) years and thereafter may be re-appointed for a term of one (1) year so as to ensure staggered terms. Four community representatives shall be appointed for a term of one (1) year and thereafter may be re-appointed for a term of one (1) year.
- 2.3 A call for citizen membership shall be conducted each fall through the Office of the Municipal Clerk.

3. VACANCIES

- 3.1 The Chair shall inform the Clerk's Office of any vacancies.
- 3.2 Should a vacancy occur during an elected member's term of office the Council Selection Committee and Regional Council shall appoint a new representative to complete the balance of the term.
- 3.3 Should a vacancy occur during a citizen's term of office Regional Council shall appoint a replacement to complete the balance of the term.
- 3.4 Effective as of the date of official notification of a vacancy for a citizen representative, Regional Council shall be notified by staff. Regional Council shall then appoint a new citizen member. The replacement shall be selected from among the names submitted during the annual call for citizen representatives. In the event of the unavailability of an alternate from the list of names submitted for consideration through an annual call for committee members, Regional Council may appoint a citizen through an additional call for expressions of interest.

4. DUTIES

The duties of the HRM Special Events Advisory Committee are to:

- 4.1 Advise Regional Council on all matters related to the allocation of the Special Event Reserve, Festivals & Events Grants and Summer Festivals Grants,
- 4.2 Continue to review eligibility criteria, priorities, policy and procedures for assistance under the respective programs and services managed under the auspices of the HRM Special Events & Festivals Grants portfolio;

- 4.3 The duties of the HRM Special Events Advisory Committee shall be reviewed annually by staff and Committee members and may be amended by Regional Council on an on-going basis.

5. QUORUM

- 5.1 A quorum at a regular meeting of the HRM Special Events Advisory Committee shall be a simple majority of members (7) of which one (1) shall be the elected representatives.

6. MEETINGS

- 6.1 The committee shall meet as required to facilitate the timely review and recommendations on the Special Event Reserve, Festivals & Events Grants and Summer Festivals Grant applications.
- 6.2 The Chair in consultation with staff shall be responsible for calling all meetings of the HRM Special Events Grants Committee.
- 6.3 Notice of the HRM Special Events Advisory Committee meetings and minutes shall be provided by the Office of the Community Relations & Events Division.

7. REMUNERATION

Members of the HRM Special Events Advisory Committee shall not be remunerated for serving on the committee except where reimbursement is made in accordance with HRM policy for reasonable expenses incurred while in the service of the Committee.

8. DECLARATION OF CONFLICT OF INTEREST

Where personal or professional involvement or association could result in an actual or perceived conflict of interest for a member of the HRM Special Events Advisory Committee, the member shall declare the conflict and abstain from debate on the related topic, or where appropriate remove themselves from a meeting and shall not vote on any motion applying to the declared conflict.

Attachment 1
HRM Civic Events Policy Framework

1.0 Introduction

The role of festivals and celebrations in HRM is not only provide entertainment for residents and visitors, but also to contribute to a sense of community, to build bridges between diverse populations and to give them an opportunity to gather in celebration of the history and diversity of the place in which we live. HRM has introduced programs and focused resources on developing and supporting festivals and special events throughout the region, recognizing their potential for enriching the quality of life for residents, generating economic activity, and showcasing HRM. While it is not possible to support all events, this policy is intended to focus HRM's effort on those that best satisfy the following goals:

1.1 The Goals:

The following goals will guide all decision of HRM's civic events program:

- 1.1.1 To enrich the quality of life for residents and to enhance the experience of visitors.*
- 1.1.2 To provide a variety of quality activities accessible to people of all ages and walks of life.*
- 1.1.3 To contribute to community development through events celebrating HRM's heritage, culture and diversity and sense of community.*
- 1.1.4 To contribute to economic development by raising HRM's profile as a tourist destination, and a place in which to invest .*
- 1.1.5 To support distinctive events.*
- 1.1.6 To foster positive community relations in HRM through events and festivals that facilitate positive interaction between citizens, staff, politicians and communities.*

1.2 The Guiding Principle Statements

Achieving these goals will require that HRM adopt a new philosophy to HRM civic events program. Specifically, future decisions respecting HRM's civic events and granting program will be guided by the following statements:

Principle 1

Events fostering community building, community development, community relations and quality of life are the core mandate of HRM's civic events program and will be the priority recipient of funding through HRM's civic events operating budget.

Principle 2

Events focussing on attracting tourists are very important to HRM's economic, tourism and cultural growth, but are not the core mandate of HRM's civic events program.

Principle 3

HRM will provide an equitable division of funding to all HRM events based on key goals and outcomes.

1.3 The Strategic Directions

HRM has a critical leadership role to play in the development of community, maintaining a quality of life and providing residents a broad range of experiences. It is also in HRM's interest to support economic and tourism development. To fulfill this role this strategy provides a comprehensive approach based on the following 6 strategic areas of focus.

- (a) Festivals,*
- (b) Celebrations,*
- (c) Civic Events,*
- (d) Commercial Events,*
- (e) Tourism Events,*
- (f) Sporting Events*

1.4 Operational Framework Policy

In order to achieve the overall goals of the event strategy, the following operational framework will be used to guide all decision-making around event funding and overall operational priorities and focus. The operational framework is intended to focus on two specific outcomes, (1) *community development* and (2) *economic or tourism development*. Those events focussed on "community development" outcome will primarily comprise festivals, celebrations and civic events, while those focussed on economic and tourism development will generally include commercial events, tourism events, such as Hallmark events, special events, and sporting events.

General Policy

HRM will adopt an civic events operational framework focussed on "community development" and "economic and tourism development" outcomes. Under "community development" the strategic focus will be festivals, celebrations and civic events. This focus is intended to help improve and develop a sense of well-being within the diverse communities of HRM, reduce inequalities and feelings of disadvantage, increase residents feelings that their local area is a place where people from different backgrounds and communities can live together harmoniously; and to help residents feel good about and have pride in where they live. Under "tourism and economic development outcomes" the focus will be on commercial, tourism, cultural and sporting events which are important for fostering sustainable growth and giving HRM a competitive edge over other regional centres worldwide.

Policy 1 The HRM Operating Budget will be the source from which HRM will fund events focussing on community development outcomes as generally described in the General Policy.

Policy 2 The HRM Special Events Reserve will be the source from which HRM will fund events focussing on economic and tourism development as generally described in the General Policy.

Policy 3 Notwithstanding Policy 2, funding of major civic celebrations may be considered through the Special Events Reserve where the significance of the celebration may exceed the capacity of any one year's operating budget allocation. These may include such events as the 100th Anniversary of the Halifax Explosion, Canada 150th, the 75th Anniversary of the End of World War II, and HRM's Twinning Anniversary.

FESTIVALS

Policy 4 Pursuant to Policy 1, HRM will provide support to festivals which are annual (or bi-annual) cultural events, over a short duration that is actively programmed around a central format or theme, encompassing multiple performances, exhibitions, and other activities related to arts and culture. They are publicized regionally, are primarily non-competitive and tend to originate in HRM. Emphasis will be on community based festival or professionally led festivals organized by the same non-profit society every year, and is primarily for the benefit and enjoyment of local residents, as generally described below:

- (a) Community-based festivals which are large or small festival encompassing a broad definition of culture, including music and other performances, crafts, cuisine, or other cultural expressions of the community. (e.g. Multi-Cultural Festival, Bedford Days, Sackville Patriot Days, Waverley Gold Rush Days)*
- (b) Professional festivals which involve performing, visual, media or literary arts festival with professional administration and paid artistic participants. (eg. Atlantic Film Festival, Atlantic Jazz Festival, Atlantic Fringe Festival, Word on the Street, Scotia Festival of Music, and Halifax Pop Explosion)*

CELEBRATIONS

Policy 5 Pursuant to Policy 1, HRM will provide support to celebrations which are very similar to festivals in that they are (1) organized by the same non-profit society every year, (2) primarily provide for the benefit and enjoyment of all HRM residents, (3) are publicized HRM wide and (4) tend to originate in HRM. The primary difference is that a celebration is only a one-day event with a significant cultural component actively programmed around a theme, anniversary or companion activity. Emphasis will be on community-based celebrations and major parades as generally describe below:

- (a) *Community-based celebration* - one-day event encompassing a broad definition of culture, including music and other performance, crafts, cuisine or other cultural expressions of the community. (e.g. *Hakodate-Little Japanese New Year, Dartmouth Christmas Tree Lighting, Halifax Explosion Memorial Service in Halifax and Dartmouth.*)
- (b) *Major Parades* - large-scale parades publicized HRM-wide. (e.g. *Spryfield Santa Claus Parade, Holiday Parade of Lights, Pride Parade, Light Up Bedford Parade, and the operation of municipal float*)

CIVIC EVENTS

- Policy 6 *Pursuant to Policy 1, HRM will provide direct funding and service delivery for Civic Events which are special events originating in HRM and held for the benefit of HRM's residents, and that HRM, on its own or in partnership with other organizations, has initiated and/or has a significant role in organizing. (e.g. HRM Christmas Tree Lighting, Menora Lighting, BT New Year's Eve, Halifax - Dartmouth Canada Day, and Halifax - Dartmouth Natal Day)*

COMMUNITY & CULTURAL AWARDS

- Policy 7 *Pursuant to Policy 1, HRM will support community and cultural awards which are events that celebrate and acknowledge community pride and cultural achievement. These events are limited to recognition of citizens and artists geographically located within the Halifax Regional Municipality and/or the Province of NS in their scope. Funding support will be directed to events that do not qualify for funding through other sources such as the HRM Heritage Reserve or the Culture Operating Budget. (e.g. Dartmouth Book Awards, and Volunteer Recognition Awards)*

COMMERCIAL EVENTS

- Policy 8 *Pursuant to Policy 2, HRM will support commercial special events which include events such as major outdoor concerts, professional sports and or the bids associated with such events. (e.g. Rolling Stones Concert, NHL Hockey, CFL Exhibition Game, Women's LPGA)*

TOURISM EVENTS

- Policy 9 *Pursuant to Policy 2, HRM will provide support to tourism events which are defined as events that are large, compelling to a major market and with high expenditure potential. Such events also have a high potential for international exposure and the ability to encourage multi-day visits. To be considered a true tourism event, a material share of total participation must come from overnight tourists/visitors. Emphasis will be on hallmark tourism events and major special events as generally describe below:*

- (a) *Hallmark Tourism Events* - A recurring event possessing such significance, in terms of tradition, attractiveness, image, or publicity that it provides the host community with a competitive advantage. These events are associated with HRM's identity, help raise its profile globally, and position it as a place to invest. Over time, the event and destination can become inseparable in terms of their image. (e.g. *2007/09 Tall Ships, Halifax International Busker Festival, Royal NS International Tattoo, and NS International Air Show*)

- (b) *Major Special Events* - A one-time, large-scale event possessing such significance that it provides the host community with a competitive advantage. (e.g. *ECMA, Junos, and Royal Visits*)

SPORTING EVENTS

Policy 10 *Pursuant to Policy 2, HRM will provide support to sporting events which are large, compelling, major market events with high expenditure potential. Such events also have a high potential for national and international exposure and the ability to encourage multi-day visits. To be considered a true sporting event, a material share of total participation must come from overnight tourists/visitors. Emphasis will be on national and internationally sporting events and mega-events as generally describe below:*

- (a) *National Sporting Event* - an amateur athletic or semi-professional activity that is of national caliber and attracts equally participants and spectators from across Canada. It is usually either a National Championship for that sporting event or even a World or Olympic Games qualifier. (e.g. *CIS Final Eight, Canadian Sprint Canoe Championship, Tim Horton's Roar of the Rings Olympic Qualifier, Skate Canada, and Memorial Cup*)
- (b) *International Sporting Event* - an amateur athletic or semi-professional activity that usually has International accreditation and attracts both participants and spectators world-wide. These events tend to attract international media coverage, have large corporate sponsorships, and host athletes with international name recognition. (e.g. *IIHF World Hockey Championships, ICF World Curling Championships, World Canoe Championships*)
- (c) *Mega-Events* - Defined as events that, by way of size or significance, yield extraordinarily high levels of tourism, media coverage, prestige, or economic impact for the host community or destination. (e.g. *Common Wealth Games and Canada Games*)

ADVISORY COMMITTEE

Policy 11 *HRM shall establish a Special Events Grants Advisory Committee to review, evaluate and make recommendations to Regional Council regarding the annual Special Event Reserve, Festivals & Events Grants and the Summer Festival Grants. Further, the Committee shall adopt the set of Evaluative Criteria (Schedule 1) to guide decision making, which may from time to time be amended when deemed necessary by the Committee*

EXCLUSIONS

Policy 12 *Council shall not fund competitions, banquets and dinners associated with conferences and events; events which seek to enhance the image of an illegal activity; or events which are designed to promote a specific political or social perspective or agendas.*

Attachment 2

Reserves Business Case

Halifax Regional Municipality • Corporate Services • Finance Division • 490-4446 • Fax: 490-4175

Date: March 27, 2007

Contact: Paul Dunphy, Director of Community Development

Marketing Levy Special Events Reserve - Q315

Purpose

To provide funding to attract and host exceptional Tourism, Culture, & Heritage events, that typically are national or international in calibre and occur on an infrequent basis, where HRM provides a leading and/or hosting role.

Source of Funds

An ongoing transfer of 40% of the Provincial Hotel Sales Tax (Marketing Levy)

The reserve has a ceiling of \$1,000,000 (One Million Dollars).

Application of Funds

The Marketing Levy Special Events Reserve (the Reserve) will be used primarily in support of events that focus on tourism and economic development as the primary outcomes, with quality of life as a secondary outcome.

Variety - The Reserve may be used to support a broad variety of events for the enjoyment of citizens and visitors. The Reserve seeks to provide resources for HRM to attract, support and provide hosting resources for tourism and economic development focused events in the cultural, sports, and heritage sectors, as defined in the events operational framework.

Accessibility - The Reserve will give priority to supporting the “free to the public” elements of events and activities as compared to those elements that are resourced through an admission fee or other revenue sources.

Marketing Levy Special Event Reserve Guidelines - Eligible Events

1) Hallmark Events - The Reserve will be used to fund current annual Hallmark Events including: The Halifax International Busker Festival, The Royal Nova Scotia International Tattoo, and the Nova Scotia International Air Show. Starting fiscal year 2007/08 the annual Hallmark events will be funded at a minimum of current funding levels or no greater than a total of 15% of the annual Marketing Levy Special Events Reserve budget.

2) Commercial Special Events - The Reserve will be used to fund commercial special events. In any given budget cycle, no more than 15% of the Reserve shall be used to fund commercial special events such as major outdoor concerts, professional sporting activities as defined in the operational framework

3) *Major Special Events* -The Reserve will be used to fund major special events and conferences. In any given budget cycle, no greater than 30% of the Reserve shall be used to fund major special events and conferences as defined in the operational framework.

4) *National and International Sporting and Mega Events* - -The Reserve will be used to fund National and International Sporting and Mega Events. In any given budget cycle, no greater than 30% of the Reserve shall be used to fund National and International Sporting and Mega Events as defined in the operational framework

5) *Major Civic Celebrations and Infrastructure* - The Reserve will support initiatives such as HRM Twinning, Memorials, Commemorations, Anniversaries, and other significant special functions. Also, the SER will support such miscellaneous expenses including float and repair to event related equipment and sites. In any given budget cycle, no greater than 10% of the Reserve shall be used to support these items.

Eligible Expenses:

- 1) Expenses related to making a Bid
- 2) HRM Services Costs related to hosting an event
- 3) HRM Capital Costs - Event Related Infrastructure and/or Improvement of HRM Owned Properties and Venues associated with hosting of qualifying special events.
- 4) Program costs (shall not exceed 1% of the annual budget)

Funding Limitations:

- HRM may pay up to 1/3 of the municipal service costs associated with the event. Contributions from other levels of government will be considered in HRM's deliberations.
- HRM may pay up to 1/3 of the program costs associated with the event. Contributions from other levels of government will be considered in HRM's deliberations.
- Emphasis will be given to those events that occur in the November 1st to April 30th time period.
- Events which have broad appeal and community interest will be given priority. It should be noted, events that are completely gated and raise revenues from that gate must clearly indicate a reason for the HRM to provide a grant.

Not Considered for Funding:

- Competitions, Banquets and Dinners associated with conferences and events
- Events which seek to enhance the image of an illegal activity
- Events which are designed to promote a specific political or social perspective or agenda

Funding Requirements:

- Event must meet the requirements of the HRM Marketing Levy Special Events Reserve Business Case. Event organizers must provide a full detailed program and a detailed budget before the HRM funding commitment is determined.

In exceptional circumstances when requests for funding from the Reserve fall outside the above guidelines, a separate report may be created for Regional Council consideration subject to approval of the HRM Events Committee.

If a grant is given to a major event that generates a profit, if the event organizer wishes to repay the grant in part or in whole, this can occur. Additionally, there may be special events that generate a profit where HRM's contribution as approved by the HRM Events Committee and Regional Council may be contingent upon repayment in full or in part.

Approval Process

All requests for withdrawals must be initiated by Community Development. Finance is responsible for ensuring availability of funds and appropriateness of expenditure prior to Council approval. These approvals are primarily done through the annual budget process or on an individual basis prior to being approved by Council.

Decisions on applications for funding will be made by the HRM Events Committee with the guidance and support of staff of the Community Development Department. Only applications which are in compliance with the Marketing Levy Special Events Reserve Business Case will be considered by the HRM Events Committee, and applications will be scored in accordance with the criteria approved by the HRM Events Committee. Community Development in cooperation with Finance will prepare an annual Marketing Levy Special Events Reserve Budget, and will be responsible for monitoring projections (actual versus budgeted expenditures). The Marketing Levy Special Events Reserve Budget will be approved by HRM Council annually as part of HRM's Budget and Business Plan.

HRM will undertake a review of the Marketing Levy Special Events Reserve Guidelines at a minimum of every 5 years.

Approval

CAO

HALIFAX REGIONAL MUNICIPALITY
BYLAW NUMBER H-400
RESPECTING MARKETING LEVY

BE IT ENACTED by the Council of the Halifax Regional Municipality under the authority of the *Halifax Regional Municipality Marketing Levy Act* as follows:

Short Title

1. This By-law shall be known as By-law H-400 and may be cited as the Marketing Levy By-law.

Definitions

- 2. In this by-law,
 - (a) “accommodation” means the provision of lodging in hotels and motels and in any other facilities required to be licensed under the *Tourists Accommodations Act* and in a building owned or operated by a post-secondary educational institution where the hotel, motel, facility or building consists of twenty or more
 - (i) rental units, or
 - (ii) rooms,
 that are offered as lodgings;
 - (c) “Municipality” means Halifax Regional Municipality;
 - (d) “operator” means a person who, in the normal course of the person’s business, sells, offers to sell, provided and offers to provide accommodation in the Municipality;
 - (e) “Purchase price” means the price for which accommodation is purchased including the price in money, the value of the services rendered and other consideration accepted by the operator in return for the accommodation provided, but does not include the goods and services tax.

Application of Levy

3. (1) A marketing levy is hereby imposed in the Municipality, the rate of which shall be 2.0 per cent of the purchase price of the accommodation.

- (2) The levy imposed under this By-law, whether the price is stipulated to be payable in cash, on terms, by installments or otherwise, must be collected at the time of the sale on the total amount of the purchase price and must be remitted to the Municipality at the prescribed times and in the prescribed manner.
- (3) If a person collects an amount as if it were a levy imposed under this by-law, the person must remit the amount collected to the Municipal at the same time in the same manner as levy collected under this Bylaw.

Exemption From Levy

4. (1) The marketing levy shall not apply to
 - a) a person who pays for accommodation for which the daily purchase price is no more than Twenty Dollars;
 - b) a student who is accommodated in a building owned or operated by a post-secondary educational institution while the student is registered at and attending a post-secondary educational institution;
 - c) a person who is accommodated in a room for more than thirty consecutive days; or
 - d) a person and the person's family, accommodated while the person or a member of the person's family is receiving medical treatment at a hospital or provincial health-care centre or seeking specialist medical advice, provided the person provides to the operator a statement from a hospital or provincial health-care centre that the person or a member of the person's family is receiving medical treatment at the hospital or centre or from a physician licensed to practice medicine in the Province of Nova Scotia that the person or a member of the person's family is seeking specialist medical advice and as a result thereof the person or a member of the person's family is in need of and the duration of the accommodation.
- (2) This By-law and the marketing levy imposed hereby shall not apply to accommodations containing fewer than 100 rooms until April 01, 2004.

Registration Of Operator

5. (1) Every operator of a facility providing accommodations to which this by-law applies shall apply for and be issued a registration certificate by the Municipality.
- (2) Where an operator carries on business at more than one place, he shall obtain a registration certificate in respect of each individual place of business.
- (3) The registration certificate shall be displayed in a prominent place on the premises.

(4) Where an operator changes his address, he shall forthwith return his registration certificate to the Municipality for amendment.

(5) Where an operator changes the name or nature of his business, he shall forthwith return his registration certificate to the Municipality for a new one.

(6) Where an operator ceases to carry on business in respect of which a registration certificate has been issued, the certificate shall thereupon be void, and he shall return the same to the Municipality within 15 days of the date of discontinuance.

(7) Where a registration certificate is lost or destroyed, application shall be made to the Municipality for a copy of the original.

(8) A registration certificate granted under subsection (1) is not transferable.

Return and Remittance of Levy

6. (1) The Municipality may at any time require a return of sales and levy collected by any person selling accommodation, such return to cover any period or periods.

(2) Subject to the provisions of subsection (1), unless otherwise provided, all operators shall make separate monthly returns to the Municipality.

(3) A separate return shall be made for each place of business, unless a consolidated return has been approved by the Municipality.

(4) The returns by operators shall be made and the levy shall be remitted to the Municipality by the 15th day of the month following the collection of the levy by the operator.

(5) If an operator during the preceding period has collected no levy, he shall nevertheless make a report to that effect on the prescribed return form.

(6) Where an operator ceases to carry on or disposes of his business, he shall make the return and remit the levy collected within 15 days of the date of discontinuance or disposal.

Records

7. (1) Every operator shall keep books of account, records and documents sufficient to furnish the Municipality with the necessary particulars of

(a) sales of accommodation,

(b) amount of levy collected, and

(c) disposal of levy.

(2) All entries concerning the levy in such books of account, records and documents shall be separate and distinguishable from other entries made therein.

(3) Every operator shall retain any book of account, record or other document referred to in this section until the Municipality authorizes its destruction.

(4) Where a receipt, bill, invoice or other document is issued by a person selling accommodation, the levy shall be shown as a separate item thereon.

Calculation of Levy

8. Where an operator sells accommodation in combination with meals and other specialized services for an all-inclusive package price, the purchase price of the accommodations shall be deemed to be the purchase price of the accommodations when such accommodations are offered for sale in the same facility without such specialized services.

Refund of Levy Written Off

9. (1) The Municipality may refund to an operator who sells accommodation a portion of the amount sent by the operator to the Municipality in respect of levy payable on that sale under this Bylaw, if

- (a) the operator, in accordance with this Bylaw, remits the levy required under this Act to be levied and collected for the sale,
- (b) the purchaser subsequently fails to pay to the operator the full amount of the consideration and levy payable on that sale, and
- (c) the operator writes off as unrealizable or uncollectible the amount owing by the purchaser.

(2) An operator may deduct the amount of the refund payable to the operator under this section from the amount of levy that the operator is required to remit under this Bylaw.

(3) If an operator who has obtained a refund under subsection (1) or made a deduction under subsection (2) recovers some or all of the amount referred to in subsection (1) (c) with respect to which the refund was paid or the deduction was made, the operator must add an amount to the levy to be paid or remitted by the operator under this Bylaw with respect to the reporting period in which the recovery was made.

Refund of Levy Collected In Error

10. (1) If the Municipality is satisfied that a levy or a portion of a levy have been paid in error, the

Municipality shall refund the amount of the overpayment to the person entitled.

(2) If the Municipality is satisfied that an operator has remitted to the Municipality an amount as collected levy that the operator neither collected nor was required to collect under this Bylaw, the Municipality must refund the amount to the operator.

Claim For Refund

11. (1) In order to claim a refund under this Bylaw, a person must

- (a) submit to the Municipality an application in writing signed by the person who paid the amount claimed, and
- (b) provide sufficient evidence to satisfy the Municipality that the person who paid the amount is entitled to the refund.

(2) For the purposes of subsection (1) (a), if the person who paid the amount claimed is a corporation, the application must be signed by a director or authorized employee of the corporation.

Interest

12. Interest payable under the By-law shall be payable at the rate of 4% above the prime rate as set by HRM banker calculated on a daily basis

Inspection, Audit and Assessment

13. A person appointed by the Municipality may enter at a reasonable time the business premises occupied by a person, or the premises where the person's records are kept,

- (a) to determine whether or not
 - (i) the person is an operator, or the premises are accommodations within the meaning of this Bylaw, or
 - (ii) this Bylaw is being and have been complied with, or
- (b) to inspect, audit and examine books of account, records or documents.

Offense

14. A person who contravenes any provision of the By-law is guilty of offence punishable by summary conviction and on conviction is liable

- (a) on a first conviction, to a fine of not less than \$500 and not more than \$1,000, and

- (b) for a subsequent conviction for the same or another provision of this regulation, to a fine of not less than \$1,500 and not more than \$5,000.

Administration of Bylaw

15. This Bylaw shall be administered on behalf of the Municipality by the Treasurer and any persons designated by the Treasurer.

Effective Date

15. This By-law shall take effect from the 1st day of April, 2002.

MAYOR

MUNICIPAL CLERK

I, Vi Carmichael, Municipal Clerk for the Halifax Regional Municipality, hereby certify that the above noted by-law was passed at a meeting of the Halifax Regional Council held on, February 12, 2002.

Vi Carmichael, Municipal Clerk

No. 1 Amended by H-401
Added Subsection (2) to Section 4

Notice of Motion:	May 28, 2002
First Reading:	June 11, 2002
“Notice of Intent” Publication:	June 22, 2002
Second Reading:	July 9, 2002
Approval of Service Nova Scotia and Municipal Relations:	N/A
Effective Date:	July 13, 2002

No. 2 Amended by H-402
Amending Subsection (1) of Section 3

Notice of Motion:	July 5, 2005
First Reading:	August 2, 2005
“Notice of Public Hearing” Publication;	August 20, 2005
Second Reading:	September 6, 2005
Approval of Service Nova Scotia and Municipal Relations:	N/A
Effective Date:	January 2, 2006

HRM Special Events Reserve Criteria / Scoring Sheet
Revised as of October 17, 2007

Criteria	Score	Values
National or International	/15	National Events = 10 International Events = 15
Free or low cost Gated vs. Non-Gated	/15	Free = 15 Combination = 10 Low Cost = 5
Attendance (Event Size)	/15	< 10,000 = 3 10,000 to 25,000 = 6 25,000 to 50,000 = 9 50,000 to 250,000 = 12 > 250,000 = 15
% Non-resident participants / spectators	/12	> 75% = 12 > 50% - 75% = 9 < 50% = 6 < 25% = 3
Tourism Period (Seasonality)	/10	Off Season (Jan. to Mar.) = 10 Shoulder Season (Apr. to June & Oct. to Dec.) = 6 Prime Season (July to Sept.) = 3
Geographic Distribution	/10	Urban = 3 Mixed = 6 Rural = 10
Financial Support	/5	Provincial Government = 1.25 Federal Government = 1.25 Corporate = 1.25 Community = 1.25
Other Factors - Legacy - Event and HRM have become inseparable in terms of image - Frequency of event - Provides HRM a competitive advantage	/6	Tradition, attractiveness, image, or publicity = 1.5 Recurring = 1.5 Associated with HRM's identity = 1.5 Raises HRM's profile globally = 1.5

Business Case

- Economic Impact
- Budget Breakdown
- Pre & Post Benefits

ROI information

- Ratio of return to HRM and/or the Province in terms of local investment and HST spin-off

/12

Bonus Score (see below)

/10

Final Total

Business Case - Economic Impact - Budget Breakdown - Pre & Post Benefits ROI information - Ratio of return to HRM and/or the Province in terms of local investment and HST spin-off	/12	
Bonus Score (see below)	/10	
Final Total		