

Special Events Advisory Committee
November 9, 2011

TO: Chair and Members of the Special Events Advisory Committee



SUBMITTED BY: _____
Brad Anguish, Director of Community & Recreation Services

DATE: October 14, 2011

SUBJECT: _____
Revised Event Grant Application and Evaluation Tools

ORIGIN

The Special Events Advisory Committee has identified deficiencies and areas of concern with the event grant application and evaluation tools.

RECOMMENDATION

It is recommended that the Special Events Advisory Committee approve the amended event grant application and evaluation tools attached to this report.

BACKGROUND

In 2002, Provincial legislation was passed enabling HRM to establish a levy on hotels of 25 rooms or greater. The legislation set the maximum levy rate at 2%. In its first year, HRM set the levy rate at 1.5%, with 1/3 of the proceeds generated to support a new "Special Events Reserve" and 2/3 for Destination Halifax. The theory behind the reserve was to create an additional source of revenue for the Municipality to address the mounting pressure on the operating budget created by major events, such as Tall Ships and sporting championships. In 2007, the Levy rate was increased to its maximum of 2%, with 40% of the total amount of revenue generated directed to HRM's Reserve, and 60% to Destination Halifax.

In March of 2007, Council approved a new Civic Events Policy and Granting Framework to improve the overall approach to HRM's civic event granting process. Concurrently, Council also approved the establishment of the Special Events Advisory Committee (SEAC) to review grant applications and make recommendations to Council based upon evaluation criteria provided in the Civic Events Policy and Granting Framework.

In June of 2010, Council formally adopted the HRM Event Strategy. The strategy addresses the growth and development of the event sector within HRM, the changing social and economic factors that are impacting special events, and the direction of events within HRM over the next 15 years.

This year SEAC's composition was changed in response to HRM's new standing committee model which resulted in a change in more than half of the SEAC membership. A number of existing SEAC operational matters were questioned which staff was directed to address. The following report is staff's response to those matters.

DISCUSSION

Some key issues that have emerged and those identified in the Event Strategy are:

- The current event grant application does not provide the information that SEAC requires to make decisions and link to priorities;
- Evaluation criteria has proved to be challenging at times for clarity of intent;
- Evaluation criteria may not represent SEAC's current focus; and
- Lack of consistency in information presented by applicants.

In response to the issues of clarity and improved criteria, staff have revised both the Marketing Levy Special Events Reserve (MLSER) Grant Application and MLSER Scoring Sheet. As well, as suggested by SEAC, staff have created a presentation template and budget template that will be shared with all applicants applying for funding from the MLSER. These revised staff tools will be implemented for the next grant intake.

HRM Event Grant Application

The revised HRM Event Grant Application is Attachment 1. Key changes to this document are summarized in Table 1 below:

Table 1: HRM Event Grant Application	
Proposed Change	Rationale
Title page to include event title	Application did not have event title until the third page which made identifying application difficult.
Proof of not-for-profit status now requested	As part of auditors recommendations, applicants need to supply proof of status in order to receive public funds.
Amount of debt to HRM now requested	Factor identified by SEAC as important for deliberation of current grant requests.
Question revised regarding community engagement and benefit	The wording of the question was not retrieving the information SEAC needed for evaluation.
Question added on including diversity	Identified by the Event Strategy as an important strategic outcome.
Other levels of government and organization funding/support now requested	In the previous scoring sheet, staff had to evaluate other levels of funding without specific information.
Top 3 event goals now requested	Identified by SEAC as important for evaluating applicants.
Attendance request	Attendance is separated by categories for improved analysis.
Destination Halifax question added	As per the request of Destination Halifax.
Marketing & Tourism questions combined	There were three questions with the same outcome. Staff deemed these to be repetitive.
Legacy question added	As requested by SEAC.
Event sustainability question added	Factor identified by SEAC as important for deliberation of current grant requests.
Approximate event attendance changed from percentages to numerical estimates	As requested by SEAC.
Freedom of information disclosure information included on page 9	As requested by the Clerks Office.

Event Grant Application

The revised MLSER Tourism Score Sheet is Attachment 2. Key changes to this document are summarized in Table 2 below:

Table 2: MLSER Score Sheet	
Proposed Change	Rationale
National or International	This category was struck from the original score sheet because the question was redundant. In order to qualify for MLSER funding, an event must be a national or international caliber event.
Attendance Size	The point system was increased from 10 to 15.
Tourism Period	The point system was decreased from 10 to 9 to make the increments the same value.
Geographic Distribution	The point system was decreased from 10 to 9 to make the increments the same value.
% non-resident participant/spectators, financial support, other factors and business case/ROI information	These four areas were revised into four new categories: Event Sustainability, Community Engagement, Tourism Impact and Economic Impact.
Event Sustainability	New category created that incorporates the original financial support category (federal, provincial, commercial, corporate), volunteer capacity and event organizer experience. The addition of volunteer capacity building and event organizer experience are areas noted in the Event Strategy as well as supported by SEAC.
Community Engagement	New category that incorporates some of the original other factors category (HRM identity & culture). As well, a legacy and diversity factor was added as per SEAC's request.
Tourism Impact	New category created to acknowledge event's ability to affect HRM's tourism. Factors include exposure and adding to HRM's event reputation.
Economic Impact	New category created that incorporates the original % non-resident participant/spectator category. This new category includes the number of tourists (not percentage), budget size, fiscal management, local expenditures and appropriate return on investment.
Chair of SEAC Signature	This requirement was removed as the Chair is not present when applications are scored.

Presentation and Budget Templates

These have been created to ensure that SEAC receives the same level of information presented in a consistent manner. This is intended to make analysis and decision-making more efficient. Both templates will be distributed to applicants when they are invited to present to SEAC. The presentation template is Attachment 3 and the budget template is Attachment 4.

BUDGET IMPLICATIONS

There are no budget implications.

FINANCIAL MANAGEMENT POLICIES / BUSINESS PLAN

This report complies with the Municipality's Multi-Year Financial Strategy, the approved Operating, Project and Reserve budgets, policies and procedures regarding withdrawals from the utilization of Project and Operating reserves, as well as any relevant legislation.

COMMUNITY ENGAGEMENT

Community engagement for this process involves staff seeking the input of relevant and knowledgeable stakeholders through the Special Event Advisory Committee to advise on the proposed events. Event organizers are also invited to attend a SEAC meeting to present and to answer questions.

ALTERNATIVES

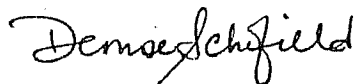
- Alternative 1: SEAC could approve the attached documents with revisions.
Alternative 2: SEAC could choose to maintain the current application and scoring sheet. This is not recommended as the current documents do not address the concerns as outlined in the report.

ATTACHMENTS

- Attachment 1: Revised HRM Event Grant Application
Attachment 2: Revised MLSER Score Sheet
Attachment 3: Presentation Template
Attachment 4: Budget Template

A copy of this report can be obtained online at <http://www.halifax.ca/commcoun/cc.html> then choose the appropriate Community Council and meeting date, or by contacting the Office of the Municipal Clerk at 490-4210, or Fax 490-4208.

Report Prepared by: Paul Forrest, Event Coordinator, 490-6979



Report Approved by: Denise Schofield, Manager, Community Development & Partnerships, 490-6252

Civic Event Grant Application

FOR OFFICE USE ONLY

Reference Number:	Date Received:
Pre-screen Reviewed <input type="checkbox"/> Yes <input type="checkbox"/> No	Grant Approved <input type="checkbox"/> Yes <input type="checkbox"/> No Sum:

IMPORTANT: Please thoroughly read this page as our application process has recently changed.

**COMPLETION AND SUBMISSION OF A CIVIC EVENTS GRANT
APPLICATION DOES NOT GUARANTEE FUNDING.**

**FUNDING IS NOT CONFIRMED UNTIL
AFTER HALIFAX REGIONAL COUNCIL APPROVAL.**

*I, the applicant, understand the above disclaimer
and that in no way does submission of this application guarantee my event funding.*

Name of Event

Applicant Signature

Date

This section must be signed and dated for applications to be processed.

HRM supports events that build community, foster good community relations, develop local economy and tourism industry, and enrich the quality of life of all residents and visitors. This application is for three of HRM Civic Event's Granting Streams, **Festivals and Events Grant, Summer Festival Grant, and Marketing Levy Special Events Reserve.**

Follow these **three steps** to apply for a Civic Events Funding Grant:

Step 1	Read and sign the Completion and submission statement at the top of this page.
Step 2	Read the Grant Descriptions on page 2 to determine which grant stream you are applying for and what sections you are to complete.
Step 3	Complete all required sections of this application form for your grant stream, and the Checklist to confirm that you have completed all relevant sections of the form and have included all required support material.

** All Civic Events Grant Applications are put through an internal prescreen process to determine potential eligibility under the Civic Events Policy and Granting Framework. Applicants unsuccessful in the prescreen process will be notified. Successful completion of the prescreen process does not guarantee funding.*

** Applicants will receive the results of their grant application approximately **five months** after the application deadline.*

** All information submitted is subject to the freedom of information disclosure clause (FOIPOP).*

Civic Event Grant Application

GRANT DESCRIPTIONS

please check which granting stream you are applying for. Separate applications must be completed if apply for multiple streams. If successful, only one grant stream will be awarded to an event.

Festivals and Event Grant

Sections to Complete

Part A

Part C

Funding geared to community non-profit organizations for events including festivals and celebrations, such as community festivals or summertime BBQs.

Fundraising events, conferences, sporting events, private events, political events or events receiving funding from other HRM sources **do not qualify** for this grant.

Summer Festival Grant

Sections to Complete

Part A

Part C

Funding to community events located within the former Halifax County Municipal boundaries for events including festivals and celebrations.

Fundraising events, conferences, sporting events, private events, political events or events receiving funding from other HRM sources **do not qualify** for this grant.

**Marketing Levy
Special Events Reserve**

Sections to Complete

Part A

Part B

Part C

Funding for national or international culture, sport and heritage events that do not occur annually.

Fundraising events, conferences, private events, political events or events receiving funding from other HRM sources **do not qualify** for a grant.

Please complete this application and return **all pages** by:

Mail:
Halifax Regional Municipality
Community & Recreation Services
Attn: Civic Event Grant Process
P.O. Box 1749
Halifax, NS B3J 3A5

Drop off:
Halifax Regional Municipality
Community & Recreation Services
Attn: Civic Event Grant Process
Alderney Gate, 2nd Floor
40 Alderney Drive
Dartmouth, NS

Fax: 902.490.5950

Email: CivicEventsGrants@halifax.ca

Applications must be received by HRM staff prior to the deadline.

Contact 490.2700 with any questions.

Civic Event Grant Application

PART A. To be completed by ALL applicants

Event Title _____

Event Date _____

Event Location _____

Hosting/Planning Organization _____

Proof of Not-for-Profit Status (Nova Scotia Registry of Joint Stock ID Number or similar): _____

Primary Contact _____ Position _____

Address _____

Phone Office) _____ Home) _____

Cell) _____ Fax) _____

Email _____ Website _____

Full name and complete mailing address of payee if the event is awarded a grant (if different than above):

Mailing Address _____

1. How much funding are you requesting from HRM for your event? _____

2. What will the requested funding be used for?

3. Yes No Has your event previously received support from HRM? If so, how much and when? _____

4. Yes No Does the event have an outstanding debt owed to HRM? If yes, please indicate the owing amount: _____

5. Yes No Is your event receiving any other type of funds or support from HRM this year?
If yes, your event does not qualify under any current grant program. Further consideration will not be given to your application.

6. Yes No Is the hosting/ planning organization a for-profit entity?
If yes, your event does not qualify under any current grant program. Further consideration will not be given to your application

7. Yes No Is your event a fundraiser, conference, competition, banquet or dinner?
If yes, your event does not qualify under any current grant program. Further consideration will not be given to your application

Civic Event Grant Application

8. Yes No Does your event have a specific political or social perspective or agenda?
If yes, your event does not qualify under any current grant program. Further consideration will not be given to your application

9. Is this the first year for the event or is the event annual, bi-annual or another reoccurring event?
Please explain.

10. What is the theme of the event?

11. Please provide a brief description of the overall event:

12. Please describe how the event plans to engage the local community and how the local community will benefit from this event:

13. Please describe any cultural components associated with your event (*heritage, performance, etc.*)

Civic Event Grant Application

14. Please describe how the event plans to include and celebrate HRM's diversity?

15. Please state the event's top three goals: *(a goal is an inspirational statement that can be measured)*:

Goal 1: _____

Goal 2: _____

Goal 3: _____

16. What is the approximate amount of people who will be involved with your event? (if applicable):

Spectators/ Audience _____

Participants/ Athletes _____

Volunteers _____

Staff _____

Total _____

17. Approximately how many people participated last year in your event (if applicable)?

Spectators/ Audience _____

Participants/ Athletes _____

Volunteers _____

Staff _____

Total _____

FESTIVAL AND EVENTS GRANT applicants please skip to Part C.
SUMMER FESTIVAL GRANT applicants please continue to Part C.
MARKETING LEVY SPECIAL EVENTS RESERVE applicants please continue to Part B.

Civic Event Grant Application

**PART B. FESTIVAL AND EVENTS GRANT applicants please skip to Part D.
SUMMER FESTIVAL GRANT applicants please skip to Part D.
MARKETING LEVY SPECIAL EVENTS RESERVE applicants complete this section.**

18. Yes No Has the event contacted Destination Halifax to discuss marketing opportunities?
If no, please visit www.destinationhalifax.com or call (902) 422-9334 to arrange a meeting.

19. Yes No Has the event applied for funding/ support from the Provincial government,
Federal government or anything other organization?
If yes, please inform us:

20. What evaluation tools and techniques will the event apply? Please describe:

21. How will the event benefit HRM's tourism?
Describe marketing plan (scope of marketing, promotion outside HRM/ NS/ Canada, etc), exposure, profile, etc.

22. How will the event generate economic growth and benefit for HRM?
Describe HRM's return on investment, economic development, local expenditures, employment, etc.

Civic Event Grant Application

23. What is the event's legacy for HRM?
Legacy includes infrastructure, social and cultural factors.

24. What steps has the event taken to ensure it's sustainability?
Event quality, volunteer training & capacities, partnerships, organizer's experience.

25. Has the event applied for funding/ support from the Provincial government, Federal government or anything other organization?

26. Where is the estimated event attendance from?

Spectator Attendance:

- Are from HRM? _____
- Are from outside HRM? _____
- Are from outside NS? _____
- Are from outside of Canada? _____

Participant Attendance (if applicable):

- Are from HRM? _____
- Are from outside HRM? _____
- Are from outside NS? _____
- Are from outside of Canada? _____

27. Where will the estimated attendance stay while at the event?

- Friends/ relatives _____
- Campgrounds _____
- Bed & Breakfasts? _____
- Universities? _____
- Hotels? _____
- Other? _____

If other, please state: _____

Civic Event Grant Application

PART C. ALL APPLICANTS complete this section.

FESTIVAL AND EVENTS AND SUMMER FESTIVAL GRANT APPLICANTS

Have you completed: Part A
 Part C

Please attach: This year's proposed budget clearly identifying expenses and revenue including sponsorship and in kind donations.
 Last year's financial statement and operating budget
 A list of committee members and contact information*
 A copy of the last committee meeting minutes (if applicable)
 Any promotional/marketing print materials applicable
 Any additional information you feel relevant

MARKETING LEVY SPECIAL EVENTS RESERVE APPLICANTS

Have you completed: Part A
 Part B
 Part C

Please attach: This year's proposed budget clearly identifying expenses and revenue including sponsorship and in kind donations.
 Last year's financial statement and operating budget
 A list of committee members and contact information*
 A copy of the last committee meeting minutes (if applicable)
 Any promotional/marketing print materials applicable
 Any promotional/marketing print materials applicable
 Any additional information you feel relevant

**Please notify HRM of any changes to your committee member list and contact information the occur after the application submission*

ALL APPLICANTS continue to next page

HALIFAX Civic Event Grant Application

REGIONAL MUNICIPALITY

INSURANCE REQUIREMENTS

The Halifax Regional Municipality requires that special event organizers, whether all or part of the event takes place on or passes over HRM/public property, during setup, the event, and/or break-down, carry third party liability insurance at a level of not less than \$2,000,000, inclusive Bodily Injury and Property damage, in the case of the event serving or selling liquor, not less than \$5,000,000. The HRM shall be named as "Additional Insured," and again where liquor shall be served as part of the event, additional liquor liability insurance shall be obtained. A copy of all required insurance coverage shall be forwarded to HRM, care of Civic Events, at least seven (7) working days before the event start date.

FREEDOM OF INFORMATION DISCLOSURE

The provisions of the Halifax Charter (2008) shall be followed with respect to freedom of information and the right to privacy (FOIPOP). Funding applicants/recipients are advised that information pertaining to a request for funding may be shared with staff reviewers, HRM committees (including members of the public serving on same), or may be requested by third parties through a formal FOIPOP request. The Municipal Auditor may also request material in the course of a random or non-randomized financial audit of the BID Investment Fund or an internal service review.

ORGANIZATION ENDORSEMENT AND BOARD/EXECUTIVE APPROVAL

We, _____ (organization name) hereby declare that we have adopted and will uphold equal opportunity and non-discrimination policies by which discrimination on the grounds of race, creed, colour, national origin, political or religious affiliation, sex, sexual orientation, age, marital status, family relationship and disability is prohibited by and within the organization. We also acknowledge and accept the freedom of information disclosure.

By signing below we hereby confirm that all information included on this application is, to the best of our knowledge, correct at the time of submission and if funds are awarded, we accept responsibility for the use of the funds in accordance with the terms set out in the HRM Civic Events Policy and Granting Framework. HRM will be contacted in writing if any of the above information changes. We also confirm and understand that submitting any knowingly false information could result in prosecution.

This application was approved by the Board of Directors/Executive at its meeting held on _____ (dd/mm/yy).

Primary Contact	Date
Committee Witness	Committee Title

Please be sure to complete all sections of this application. Incomplete applications will not be processed. For questions on application process please contact our office, 490.2700, CivicEventsGrants@halifax.ca

Attachment 2

MLSER Tourism Event Score Sheet

Applicant:

Date:

Staff:

Criteria	Score	Values
Free or low costs (if gated)	/15	Free = 15 Combination = 10 Low Cost = 5
Attendance (Event Size)	/15	Less than 10,000 = 3 10,000 to 24,999 = 6 25,000 to 49,999 = 9 50,000 to 249,999 = 12 Greater than 250,000 = 15
Tourism Period (Seasonality)	/9	Off Season (Jan. To Mar.) = 9 Shoulder Season (Apr. – June & Oct. – Dec.) = 6 Prime Season (July to Sept.) = 3
Geographic Distribution	/9	Urban = 3 Mixed = 6 Rural = 9
Event Sustainability - Partnership Support - Volunteers - Event organizer experience	/12	Partnership support – Provincial, Federal & corporate – 4 max Volunteers – Number of volunteers, training, capacity, etc. – 4 max Event Organizer – Proven track record in Halifax, goals, etc. – 4 max
Community Engagement - Legacy (social, cultural, infrastructure) - HRM's Identity - Culture - Diversity	/12	Legacy – Appropriateness, scale, etc. – 3 max Identity – Physical attributes, heritage, etc. – 3 max Culture – Inclusive, creative, etc. – 3 max Diversity – Inclusive, innovative, etc. – 3 max
Tourism Impact - HRM Exposure - Reputation	/8	Reputation – Event delivery, hospitality – 4 max Exposure – TV, radio, paper, online, etc. – 4 max
Economic Impact - Spectators from outside HRM - ROI - Local expenditures/ Employment - Budget	/20	Number of tourists – 8 max Return on grant amount – 4 max Buying local products, equipment, services, etc. – 4 max Size/ fiscal management/ appropriateness of budget/ Low Admin O/H – 4 max
Final Total	/100	

Total points:

Percentage of grant award proposed:

Recommended grant award:

Attachment 3

SEAC Presentation Template

- This template is to guide applicants on the minimal information the Special Events Advisory Committee expects to see during a presentation.
- Applicants do not need to follow the layout provided in this presentation.

Event Name

Special Events Advisory Committee
Date

Presentation Overview

- History
- Event Overview
- Event Sustainability
- Community Engagement
- Tourism Impact
- Economic Impact
- Proposed Budget & Financials
- Questions

History

- Discuss any pertinent historical information that is relevant to the event

Event Overview

- Title of event
- Event location
- Date and length of event
- Event site layout/design
- Schedule of event
- Key features of event
- Event governance

Event Sustainability

- Partnership Supports
 - Government, corporate, sponsorship, etc.
- Volunteers
 - Numbers, training, capacity building, support, attractiveness of opportunity, etc.
- Event Organizer Experience
- Event Quality

Community Engagement

- Legacy
- Culture
- Diversity
- HRM's identity
- Community Support

Tourism Impact

- HRM exposure
- HRM reputation
- Marketing and promotion
 - % of overall budget
- Media impact

Economic Impact

- Tourist/ visitors from outside HRM impact
- HRM return on investment
- Local expenditures
- Employment

Budget

- See proposed budget template
- State debt or deficits (if applicable)
- 5 year plan (if applicable)

Amount Requested

- Event requests a grant of:
- Proposed use of HRM event grant

Questions

**Example Event Budget
Income**

Unless it's the events 1st year				
2010 Proposed	2010 Actuals	2010 In Kind	2011 Proposed	2011 In Kind

Tickets/ Gate

Advanced				
Regular/ Gate				
VIP/ Delegate				
Comps				

Promotions

Advertisements				
Merchandise				

Sponsorship

Title				
Other level				
Other level				

Gov't & Agencies

HRM				
Nova Scotia Gov't				
Federal Gov't				
Related Fund				

Other

Liquor & Beverage				
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Total Income

--	--	--	--	--

Expenses

Administrative Overhead

Legal & Professional				
Postage & Freight				
Office supplies				
Travel				
Equipment				

Transportation

Flights				
Vehicle Rentals				

Promotion

Brochure/ Guide				
Media Production				
Print Material				
Marketing				
Graphic Production				
Web Design				
Advertising				
Merchandise				

Event

Talent				
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Tickets					
Insurance					
Venue Rentals					
Sound Rental					
Technical Rental					
Technicians					
Production					
Backline					
Audio Visual Rental					
Electricity					
Security					
Volunteer clothing					
Hotel & Accommodations					
Meals/ buyouts/ riders					

Staff

Wages					
Honourariums					
Per Diems					

Rent

Office space					
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Total Expenses

--	--	--	--	--	--

Total Budget (cash & in kind)

--	--	--	--	--	--

Gross Surplus/ Deficit

--	--	--	--	--	--

Other Expenses

Debt Repayment					
Contingency					

Total Other Expenses

--	--	--	--	--	--

Net Surplus/ Loss

--	--	--	--	--	--