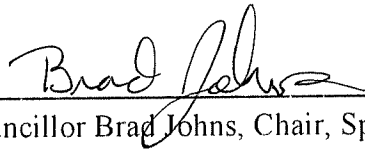


**Halifax Regional Council  
March 3, 2009**

**TO:** Mayor Kelly and Members of Halifax Regional Council

**SUBMITTED BY:**



Councillor Brad Johns, Chair, Special Events Advisory Committee

**DATE:** February 18, 2009

**SUBJECT:** Special Events Grants Request

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**ORIGIN**

January 29, 2009 Special Events Advisory Committee meeting.

**RECOMMENDATIONS:**

It is recommended that Halifax Regional Council approve:

1. \$10,000 to the Scotia Festival of Music from MLSER (Q3 15) as per the staff report dated November 6, 2008; and
2. Amend the Civic Event Policy and Granting Framework and MLSER Business Case to include the Scotia Festival of Music as a "Hallmark Event".

## **BACKGROUND/DISCUSSION**

At the December 12, 2008 meeting of the Special Events Advisory Committee, a motion was passed to forward 4 of the 5 Special Events Grants Requests contained in the staff report dated November 6, 2008 to Regional Council on December 16, 2008 for approval.

Due to time limitations, the presentation of Scotia Festival of Music was not made at the December 12, 2008 meeting of the Special Events Advisory Committee, and was deferred until the next meeting.

On January 27, 2009, the Scotia Festival of Music made a presentation to the Special Events Advisory Committee. At this time, the Committee made a motion to Regional Council to approve a grant of \$10,000 from MLSE (Q315) and to include the Scotia Festival of Music as a Hallmark Event as per Staff Report dated November 6, 2006.

## **BUDGET IMPLICATIONS**

See Staff Report dated November 6, 2009.

## **FINANCIAL MANAGEMENT POLICIES / BUSINESS PLAN**

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

## **ALTERNATIVES**

See Staff Report dated November 6, 2008.

## **ATTACHMENTS**

Attachment A - Staff Report dated November 6, 2008

Attachment B - HRM Special Events Reserve Criteria / Scoring Sheet

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

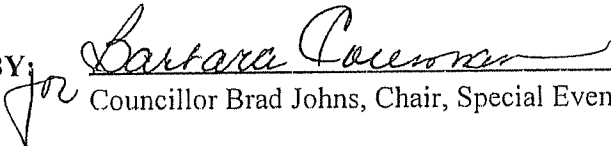
Report Prepared by: Barbara Coleman, Legislative Assistant



PO Box 1749  
Halifax, Nova Scotia  
B3J 3A5 Canada

Halifax Regional Council  
December 16, 2008

TO: Mayor Kelly and Members of Halifax Regional Council

SUBMITTED BY:   
Councillor Brad Johns, Chair, Special Events Advisory Committee

DATE: December 12, 2008

SUBJECT: Special Events Grants Requests

**ORIGIN**

December 12, 2008 Special Events Advisory Committee meeting.

**RECOMMENDATION**

It is recommended that Halifax Regional Council approve grants of:

1. \$10,000.00 to the Halifax Pop Explosion from the MLSER (Q315)
2. \$125,000.00 to the Halifax Rainmen Holiday Classic from the MLSER (Q315)
3. \$15,000.00 to the New Year's Eve Celebration from the MLSER (Q315); and
4. \$10,000.00 to Democracy 250 from the MLSER (Q315)

**BACKGROUND/DISCUSSION**

After presentations and discussions with the Committee members, it was decided to forward the above mentioned grants on to Regional Council for approval noting the following:

1. Scotia Festival of Music did not present at this time;
2. Halifax Holiday Classic Basketball Event (Halifax Rainmen) had revised their ask for \$250,000 to \$176,000 from and were approved for \$125,000.00;
3. This would change the end resulting total of Table 1 - Proposed Funding Amounts from Marketing Levy Special Events Reserve from \$1,324,500.00 to \$1,349,500.00.

**BUDGET IMPLICATIONS**

See staff report dated November 6, 2008

**FINANCIAL MANAGEMENT POLICIES / BUSINESS PLAN**

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

**ALTERNATIVES**

See staff report dated November 6, 2008

**ATTACHMENTS**

Attachment A -Staff Report dated November 6, 2008

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

Report Prepared by: Ms Barbara Coleman, Legislative Assistant



PO Box 1749  
Halifax, Nova Scotia  
B3J 3A5 Canada

Special Events Advisory Committee  
December 10, 2008

TO: Special Events Advisory Committee

SUBMITTED BY:

Paul Dunphy, Director, Community Development

DATE: November 6, 2008

SUBJECT: Special Events Grant Requests

#### ORIGIN

1. June 18, 2008, the Special Events Advisory Committee deferred recommendations for the Halifax Pop Explosion and Scotia Festival of Music, pending presentations;
2. Subsequent to Regional Council's July 5, 2008 approval of event funding, organizers of Halifax Holiday Classic Basketball Tournament, Democracy 250, and HRM's 15<sup>th</sup> Anniversary New Year's Eve program events, requested funding.

#### RECOMMENDATION

It is recommended that the Special Events Advisory Committee recommend that Regional Council approve grants of:

1. \$10,000 to the Halifax Pop Explosion from the MLSER (Q315);
2. \$10,000 to the Scotia Festival of Music from MLSER (Q315);
3. \$100,000 to the Halifax Rainmen Holiday Classic from the MLSER (Q315);
4. \$15,000 to the New Year's Eve Celebration from the MLSER (Q315); and
5. \$10,000 to Democracy 250 from the MLSER (Q315);

It is further recommended that the Special Events Advisory Committee recommend that Regional Council:

1. Amend the Civic Event Policy and Granting Framework and MLSER Business Case to include the Halifax Pop Explosion and the Scotia Festival of Music as "Hallmark Events" (Attachment One); and
2. approve the amended Table 1 (events in white) to be funded from the Marketing Levy Special Events Reserve (Q315).

## BACKGROUND

In March 2006 Council approved a new Civic Events Policy and Granting Framework to improve the overall approach to HRM's civic event granting process. The framework requires HRM's Civic Events Operating Budget (C760), be used exclusively for funding festivals, celebrations and HRM civic events. Whereas, the *Marketing Levy Special Events Reserve*, which is an operating reserve funded through the hotel levy, would be used to fund non-annual commercial, tourism and sporting events of national and international calibre. Additionally, the Reserve would fund HRM's annual Hallmark events.

On May 13, 2008, Regional Council approved the 2008 event grant recipients from HRM's 4 event grant streams (Annual Events, Festival & Events, Summer Festival, and the Marketing Levy Special Event Reserve grants). A subsequent report was before Council on July 8, 2008 at which time additional event funding was approved including the International Buskers Festival. Since the summer, a number of new event organizers have come forward seeking support. The following background provides an overview of these events:

### 1. The Halifax Pop Explosion

The Halifax Pop Explosion is one of Canada's most respected festivals and showcases for new and emerging music, art, and culture. Founded in 1993, the festival features the best in new music, and fuses it with the unique perspectives and exhibitions of art, media and pop culture, from Halifax and around the world. The estimated audience of 16,000 tells only part of the story relative to the reach of this festival. This festival consistently receives international exposure on leading new music/youth websites and it has an outstanding reputation internationally as a leading new music festival. The Halifax Pop Explosion is seeking \$10,000 in funding. Periodically, HRM has supported this festival through the Festival & Events grant of \$500. The Pop Explosion is also seeking Hallmark status.

### 2. The Scotia Festival of Music

The Scotia Festival of Music is a two-week long chamber music festival held annually and has been recognized internationally for its diverse programming and superior level of performers. On a national level it has been called "one of the most significant musical events in Canada's history". The Scotia Festival of Music is seeking \$11,000 in funding. HRM has recently supported this festival through the Festival & Events grant process with a grant of \$5,000.

### 3. Halifax Rainmen Holiday Classic

The Halifax Rainmen Holiday Classic is an international basketball tournament. The Halifax Rainmen are hosting an international Premiere Basketball League tournament featuring some of the best basketball teams in North America. The Halifax Holiday Classic Basketball Tournament organizers are seeking \$250,000. This event is defined as a Commercial Sporting Event.

#### 4. Grand Parade D250 Concert/Dingle Ceremony

Democracy 250 (D250) events occurred throughout 2008 to celebrate the 250<sup>th</sup> year of representative government in Nova Scotia. The D250 concert in the Grand Parade featured the nationally known band Hedley and the top 3 Canadian Idol winners for 2008. The concert drew a young audience to the Grand Parade to celebrate this anniversary. The Dingle Tower marked its 150<sup>th</sup> anniversary this year. The Tower was originally erected to commemorate the 100<sup>th</sup> year of representative government in Nova Scotia. A formal ceremony was conducted this fall at the Dingle Tower to acknowledge this moment in HRM's history. This is a Commemoration event pursuant to the Civic Events Policy. The D250 is seeking \$10,000 in funding.

#### 5. New Year's Eve 15<sup>th</sup> Anniversary Event

Since 1994 the Halifax Regional Municipality and CTV Halifax have partnered in order to bring the largest single New Year's Eve Celebration east of Toronto. The celebration has consisted of a live outdoor entertainment stage in the Grand Parade and a spectacular fireworks show at 12:00 midnight over Halifax City Hall. The event attracts upwards of 20,000 people to the core, people travel from across Atlantic Canada to be part of the live television audience and over 350,000 people tune into the New Year's Eve Show on CTV as part of their annual new year's eve tradition. In celebration of 15 years of this annual New Year's Eve program the organizers of the event are seeking \$15,000 to enhance the event through better entertainment, production quality and fireworks. This is a Commemoration event pursuant to the Civic Events Policy.

### DISCUSSION

This report is intended to assist SEAC in its deliberations respecting the request by the Halifax Pop Explosion and the Scotia Festival of Music to become Hallmark events. Additionally, the following discussion will also provide SEAC a preliminary assessment of the proposed events in order to assist with assessing their value and potential allocation.

#### 1. Proposed Hallmark Status

In consideration of the proposals by Halifax Pop Explosion and the Scotia Festival of Music, SEAC must consider the Hallmark Tourism Event definition contained in the Civic Events Policy & Granting Framework. The definition states that 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. 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.”*

Based on this definition, it is staff's recommendation that the Halifax Pop Explosion and the Scotia Festival of Music should attain Hallmark Event status. Both of these events demonstrate alignment with the definition. For instance, because these festivals occur within HRM, the municipality is at a competitive advantage due to the international exposure they draw. The result of this exposure is that HRM has an outstanding reputation on the world stage in new and classical music. The

application of unconventional marketing avenues over the last number of years, such as facebook, opens a new area of promotion for the municipality that had not been fully explored. The program content of both these festivals features very high calibre of performing artists, raising the profile of the events to an international level. Finally, these type of festivals are important elements to HRM's overall quality of life and position HRM as a place to invest.

## **2. Proposed Funding Allocations**

Based on a review of the policy and evaluation criteria, it is staff's opinion that each of the above noted events satisfies the policy intent and demonstrates merit to qualify for funding. Based on past practice, staff recommend that the Committee use the following guidelines to assist in identifying an appropriate grant allocation:

- Apply the funding allocation percentages contained in the Civic Event Policy as a guide
- Employ best judgement for allocating percentages among each event category (Sport (30), Hallmark (15), Tourism(30), Commercial (15), Other (10)
- Any event scoring 50% or greater will qualify for funding
- Any event scoring between 50 - 60% will be eligible for a minimum of 25% of their ask to a maximum of 45% of their ask
- Any event scoring between 61 - 70% will be eligible for a minimum of 45% of their ask to a maximum of 65% of their ask
- Any event scoring 71% or above will be eligible for a minimum of 65% of their ask to a maximum of 100% of their ask
- Any request less than \$5,000 that received a score of 60% or more receives full request.
- Any event previously approved by Regional Council will receive the assigned value and cannot be disputed by SEAC.

### **2.1 The Halifax Pop Explosion**

Based on the scoring criteria, the Halifax Pop Explosion scored 55 percent. The funding formula would potentially qualify this festival for a \$3,500 grant. However, as noted in 2.1, given the festival has an outstanding reputation on the world stage of new music, appeals to a younger audience, and attracts many visitors to HRM. Staff is recommending a grant of \$10,000.

### **2.2 Scotia Festival of Music**

The Scotia Festival of Music scored 63 percent. Based on the formula the event would potentially qualify for a \$6,000 grant. However, as noted in 2.1, the festival, like the Halifax Pop Explosion, has an outstanding reputation on the world stage of classical music, addresses a gap in local cultural content and programming and is a major cultural presentation. Staff is recommending a grant of \$10,000.

### **2.3 Halifax Rainmen Holiday Classic**

The Halifax Rainmen Holiday Classic scored 59 percent. Based on the above formula, the event would potential qualify for \$107,000. The proposed event is an international sporting that fulfills the sporting event criteria. The event will bring a calibre of play not seen in the municipality for over



15 years when Halifax Windjammers played in the NBL. Staff are recommending a grant of \$100,000

#### 2.4 Grand Parade D250 Concert/Dingle Ceremony

These activities qualify under the HRM Civic Events Policy and Granting Framework, Policy 7, Significant Anniversaries. The D250 concert was a celebration of democracy and youth engagement. Beyond the significance of the fact that HRM is Canada's birthplace of democracy, the focus of the program on youth engagement is a cornerstone of HRM's council focus areas. As such, staff are very supportive of the program and are recommending a grant of \$10,000.

#### 2.5 New Year's Eve 25<sup>th</sup> Anniversary Event

The New Year's Eve event in the Grand Parade is a significant community event with a long tradition that places HRM in a unique position unlike any other municipality in Atlantic Canada. The partnership with CTV Halifax gives HRM the only live broadcasted show hosted by a municipality on a national network. It is also has become a destination for Atlantic Canadians, and beyond. Staff are recommending a grant of \$15,000.

**TABLE 1 - PROPOSED FUNDING AMOUNTS  
FROM Marketing Levy Special Events Reserve**

EVENT NAME	FORMER GRANT	REQUEST	SCORE %	PROPOSED \$
<b>HALLMARK EVENTS</b>				
<i>(EVENTS SHADED &amp; ITALICISED HAVE BEEN PREVIOUSLY APPROVED BY COUNCIL)</i>				
<b>15% OF 1.3 MILL (80%) = \$195,000</b>				
Scotia Festival of Music	5,000	11,000	63%	\$10,000
Halifax Pop Explosion	500	10,000	55%	\$10,000
<i>Atlantic Film Festival</i>	<i>5000</i>	<i>\$75,000</i>	<i>63%</i>	<i>\$40,000</i>
<i>Blue Nose International Marathon</i>	<i>1500</i>	<i>\$75,000</i>	<i>67%</i>	<i>\$40,000</i>
<i>Royal Nova Scotia International Tattoo</i>	<i>60000</i>	<i>\$100,000</i>	<i>78%</i>	<i>\$90,000</i>
<i>Atlantic Jazz Festival</i>	<i>5000</i>	<i>\$50,000</i>	<i>60%</i>	<i>\$25,000</i>
<i>Halifax International Busker Festival</i>	<i>43000</i>	<i>\$152,000</i>	<i>78%</i>	<i>\$50,000</i>
<i>Halifax International Air Show</i>	<i>40000</i>	<i>\$40,000</i>	<i>71%</i>	<i>\$30,000</i>

			<b>SUBTOTAL</b>	<b>\$295,000</b>
<b>SPORTING EVENTS</b>		<b>30% OF 1.3 M (80%) = \$390,000</b>		
<i>(EVENTS SHADED &amp; ITALICISED HAVE BEEN PREVIOUSLY APPROVED BY COUNCIL)</i>				
<i>Midget Baseball (no presentation)</i>	<i>\$15,000</i>	<i>50%</i>	<i>\$4,000</i>	
<i>Canadian Sprint Canoe (no presentation)</i>	<i>\$3,000</i>	<i>62.5%</i>	<i>\$3,000</i>	
<i>Canadian Dance Sport (no presentation)</i>	<i>\$1,500</i>	<i>43%</i>	<i>\$0</i>	
<i>Laser World Champ</i>	<i>\$50,000</i>	<i>72%</i>	<i>\$40,000</i>	
<i>IIHF World Hockey Championships</i>	<i>\$250,000</i>	<i>56%</i>	<i>\$250,000</i>	
<i>* Council pre-approved</i>				
<i>Bosom Buddies Boat Race</i>	<i>\$20,000</i>	<i>56%</i>	<i>\$10,000</i>	
			<b>SUBTOTAL</b>	<b>\$307,000</b>
<b>TOURISM EVENTS</b>		<b>30% OF 1.3 M (80%) = \$390,000</b>		
<i>(EVENTS SHADED &amp; ITALICISED HAVE BEEN PREVIOUSLY APPROVED BY COUNCIL)</i>				
<i>Tall Ships 2009</i>	<i>\$750,000</i>	<i>72%</i>	<i>\$270,000</i>	<i>(\$540,000 over 2 years)</i>
<i>Black Loyalist Amistad Event</i>	<i>\$25,000</i>	<i>71%</i>	<i>\$20,000</i>	
<i>Ride The Lobster (no presentation)</i>	<i>\$10,000</i>	<i>50%</i>	<i>\$2,500</i>	
			<b>SUBTOTAL</b>	<b>\$292,500</b>
<b>CIVIC CELEBRATIONS &amp; INFRASTRUCTURE</b>		<b>15% OF 1.3 M (80%) = \$195,000</b>		
<i>(EVENTS SHADED &amp; ITALICISED HAVE BEEN PREVIOUSLY APPROVED BY COUNCIL)</i>				
<i>Democracy 250</i>	<i>\$13,000</i>	<i>n/a</i>	<i>\$10,000</i>	
<i>15<sup>th</sup> Anniversary of New Years Eve</i>	<i>\$15,000</i>	<i>n/a</i>	<i>\$15,000</i>	
<i>Africville Genealogy Society/Reunion</i>	<i>\$5,000</i>	<i>n/a</i>	<i>\$5,000</i>	
			<b>SUBTOTAL</b>	<b>\$30,000</b>
<b>COMMERCIAL EVENTS</b>		<b>10% OF 1.3 M (80%) = \$130,000</b>		
<i>(EVENTS SHADED &amp; ITALICISED HAVE BEEN PREVIOUSLY APPROVED BY COUNCIL)</i>				
<i>Halifax Holiday Classic Basketball Event</i>	<i>\$250,000</i>	<i>59%</i>	<i>\$100,000</i>	
<i>Common Concerts</i>	<i>\$300,000</i>	<i>RC</i>	<i>\$300,000</i>	

	SUBTOTAL	\$400,000
TOTAL		\$1,324,500

**BUDGET IMPLICATIONS**

The Marketing Levy Special Events Reserve (Q315) project budget for 2008/09 is approximately \$2,000,000. Assuming the Reserve remains consistent, the Reserve can accommodate the proposed \$145,000 the events noted in the recommendations.

**FINANCIAL MANAGEMENT POLICIES / BUSINESS PLAN**

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

**ALTERNATIVES**

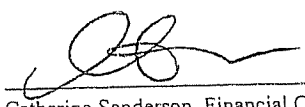
- Alternative 1: Regional Council could reduce the amount of the grant recommended by SEAC. This is not recommended.
- Alternative 2: Regional Council could increase the amount of the grant recommended by SEAC. This is not recommended.

**ATTACHMENTS**

- Attachment One: Marketing Levy Special Event Reserve Granting Evaluation Criteria
- Alternative Two: Evaluation Criteria / Score Sheets

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

Report Prepared by: Andrew Whittemore Manager, Community Relations & Cultural Affairs, 490-1585



Financial Review: Catherine Sanderson, Financial Consultant, 490-6468

*Attachment One*  
*HRM Civic Events Policy and Granting Framework*

**1.0 Introduction**

The role of festivals and celebrations in HRM is not only to 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:

- 1.1.2 To enrich the quality of life for residents and to enhance the experience of visitors.*
- 1.1.3 To provide a variety of quality activities accessible to people of all ages and walks of life.*
- 1.1.4 To contribute to community development through events celebrating HRM's heritage, culture and diversity and sense of community.*
- 1.1.5 To contribute to economic development by raising HRM's profile as a tourist destination, and a place in which to invest .*
- 1.1.6 To support distinctive events.*
- 1.1.7 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 100<sup>th</sup> Anniversary of the Halifax Explosion, Canada 150<sup>th</sup>, the 75<sup>th</sup> 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.*

### *Marketing Levy Special Events Reserve Guidelines*

#### Introduction:

A Special Events Reserve and Business Case was recommended by staff and approved by Council as part of the 2002/2003 budget process. The Special Events Reserve was established to provide for costs associated with hosting non-annual special events, with the exception of annual Hallmark Events as defined within the Civic Events Policy and Granting Framework (Attachment 1), as well as to provide and maintain infrastructure used to support for special events.

#### Special Event Reserve Goals:

The Special Events Reserve should 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.

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

*2) Accessibility* - The Special Events 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.

#### **Special Event Reserve Guidelines**

*1) Hallmark Events* - The Special Events 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 Special Events Reserve budget approved annually by Regional Council.

*2) Commercial Special Events* - The Special Events Reserve will be used to fund commercial special events. In any given budget cycle, no greater than 15% of the Special Events 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 Special Events Reserve will be used to fund major special events and conferences. In any given budget cycle, no greater than 30% of the Special Events 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 Special Events Reserve will be used to fund National and International Sporting and Mega Events. In any given budget cycle, no greater than 30% of the Special Events 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 Special Events 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 Special Events 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
- 4) Program costs

Application for Funding - Required Notice:

Requests for funding from the Special Events Reserve must align with the budget processes of a given fiscal year.

Funding Approval:

Decisions on applications for funding will be made by the HRM Grants Committee with the guidance and support of staff of the Community Development Department. A final "review" of the recommendations will take place by the CAO or designate(s). Per the HRM Multi-Year Financial Strategy, the Director, Financial Services, will provide confirmation as to the availability of funds and compliance with the Reserves Business Case prior to this review. Approved amounts will be subject to Regional Council approval during the annual HRM business planning and budget process.

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 1<sup>st</sup> to April 30<sup>th</sup> 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 Special Events Reserve Business Case.
- Event organizers must provide a full detailed program and a detailed budget before the HRM funding commitment is determined.

Guidelines Review

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

Exceptional Circumstances:

In exceptional circumstances, i.e. when requests for funding from the Special Events Reserve fall outside the above guidelines, a separate report may be created for Regional Council consideration.

Event: *The Scotia Festival of Music*Category: *Hallmark**HRM Special Events Reserve Criteria / Scoring Sheet*

Criteria	Score	Values
National or International	15/15	National Events = 10 International Events = 15
Free or low cost Gated vs. Non-Gated	10/15	Free = 15 Combination = 10 Low Cost = 5
Attendance (Event Size)	3/15	< 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	9/12	> 75% = 12 > 50 % - 75% = 9 < 50% = 6 < 25 % = 3
Tourism Period (Seasonality)	6/10	Off Season (Jan. to Mar.) = 10 Shoulder Season (Apr. to June & Oct. to Dec.) = 6 Prime Season (July to Sept.) = 3
Geographic Distribution	3 /10	Urban = 3 Mixed = 6 Rural = 10
Financial Support	5/5	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	6/6	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	6/12	\$443,000 budget
Bonus Score (SEAC)	/10	
Final Total	63/100	

**SPECIAL EVENTS RESERVE APPLICATION FORM**  
**HALIFAX REGIONAL MUNICIPALITY**

Please complete all sections of this application and return to:  
Community Relations  
Halifax Regional Municipality  
PO Box 1749, Halifax, Nova Scotia B3J 3A5

**Please Note:**

**Consideration will only be given to applications that meet the minimum standard eligibility or are existing Hallmark Events as per the Halifax Regional Council report dated March 27, 2007. (Available on the Halifax Regional Municipality website [www.halifax.ca](http://www.halifax.ca))**

**All applications will be reviewed by the Halifax Regional Municipality's Special Events Advisory Committee before any final funding decision(s) are made.**

Date: Jan 12, 2008      Date Received: \_\_\_\_\_ (Office Use Only)

1. Name & Date(s) of Special Event:

The Scotia Festival of Music 2008 – May 25-June 8, 2008

2. Name of organization hosting / planning event: Scotia Festival of Music

3. Type of organization: (please give tax number if applicable)

Community Non-profit	
Special Interest Group	
Charitable	<u>119143071RR0001</u>
Incorporated Society	
Other _____ Please Specify	

4. Primary contact for event: Chris Wilcox, Managing Director

Address: The Music Room, 6181 Lady Hammond Rd, Halifax, NS

Postal Code: B3K 2R9

Phone (902) 429-9467 (O) (902) 425-6785 (Fax)

Secondary contact for event: Cindy Haines, Office Manager

Address: \_\_\_\_\_ same as above \_\_\_\_\_

Postal Code: \_\_\_\_\_

Phone #: \_\_\_\_\_ (H) \_\_\_\_\_ (O) \_\_\_\_\_ (Fax)

5. Main theme of event: The Scotia Festival of Music is a two-week long chamber music festival held annually on the last week of May and the first week of June. It has been recognized internationally for its diverse programming and superior level of performers. On a national level it has been called "one of the most significant musical events in Canada's history".

6. Activities in event: The Scotia Festival boasts and impressive 50-plus events during its two-week festival. Events include: Highlight Concerts, Recitals, Open Dress rehearsals, Masterclasses, Noon-hour concerts, Young Artist Concerts, Concerts in alternative spaces (Historic Properties, Public Gardens) as well as a final Gala Orchestral Concert. (see attached Scotia Festival reports for details of all events. In addition to reports from the last two years, a concert program for 2008 has been included. Masterclasses and Open rehearsals have yet to be confirmed)

7. Objectives of event in order of priority: The Scotia Festival of Music has two purposes of equal importance. The first is to give a series of solo recitals, chamber music and orchestral concerts of the highest quality that rivals all international festivals in terms of its programming and national significance. The second is to inspire "Young Artists" (young professionals and advanced music students who enrol in Scotia Festival's two-week intensive study program), music teachers, students, and members of the public by presenting master classes, coaching sessions, and lectures by the Guest Artists.

8. Event Status:

New Event: \_\_\_\_\_  
 Enhanced Old Event: \_\_\_\_\_  
 Revived Event: \_\_\_\_\_  
 Hallmark Event:   X  

9. Date(s) and times to be held:   May 25-June 8, 2008  

10. Location(s):   Dalhousie Arts Centre    
  The Music Room    
  Historic Properties    
  Public Gardens  

11. Historical Background (if applicable):   see attached history or the organization  

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

12. Number of volunteers involved in event:   30  

13. Target audience:

Adult	_____	Children	_____	All	<u>  X  </u>
Families	_____	Seniors	_____		

14.1 Estimated attendance:   1500  

Estimated total attendance:

a) % who are participants	<u>  20%  </u>
b) % who are spectators	<u>  80%  </u>
c) % from local area	<u>  60%  </u>
d) % from outside the Halifax Regional Municipality	<u>  40%  </u>
e) % from outside the province	<u>  20%  </u>



14.2 From d and e above, please provide an estimated percentage breakdown for the accommodation type that will be used for out of area visitors.

a) % Visiting friends & relatives	<u>70%</u>
b) % Campground	<u>                    </u>
c) % Hotel / Motel	<u>30%</u>
d) % Bed & Breakfast	<u>                    </u>
e) % Other - Please Specify	<u>                    </u>

15. Total operating budget: \$443,000

16. Funding sources: (detail amount)

A. Grants

Provincial:	<u>\$57,000</u>	
Federal:	<u>\$50,000</u>	
Other:	<u>\$185,000 (project grants)</u>	Total: <u>\$292,000</u>

B. Sponsorship

Private:	<u>\$30,000</u>	
Corporate:	<u>\$40,000</u>	
Other:	<u>                    </u>	Total: <u>\$70,000</u>

Please attach a list of sponsors and type of sponsorship being provided. (attached)

Revenue from other sources:

Source: Broadcast Fees	Funds: <u>\$10,000</u>
Source: Advertising	Funds: <u>\$10,000</u>
Source: Ticket Sales and Registration fees	Funds: <u>\$50,000</u>

17. A. If a portion of this event is to be used for fund raising purposes, who is the beneficiary?

N/A

B. What is the total amount of funds you expect to be turned over to the beneficiary?

\_\_\_\_\_ N/A \_\_\_\_\_

C. What % of the total funds raised from all sources does this represent?  N/A

18. Has your event received support from the Halifax Regional Municipality or former municipalities in previous years? Yes \_\_\_\_\_ No  X

Please identify the year in which you received support:  N/A

Please detail the level of support you received in the past:  N/A

\_\_\_\_\_

\_\_\_\_\_

19. Briefly outline your marketing strategy for this event. (Detail any examples of print or electronic exposure you might undertake): **(See Attached Marketing Strategy)**

20. How will this event be evaluated: This event will be evaluated with a complete Festival report that will track the number of audience members, festival reviews, media and publicity and will compare these to previous festival data. (see attached Festival reports 2006 and 2007.

21. 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 AAdditional 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 coverages shall be forwarded to the Halifax Regional Municipality at least 15 working days before the event start date.

22. Do you anticipate requiring Halifax Regional Municipality services? If so please detail:

NO

**Please Note: Many municipal services are subject to costs and are the responsibility of the organizer.**

23. Using the attached piece of paper or separate documents, please provide as much detail as possible on event logistics. Please include all route maps and site plans if applicable.
24. Your financial request from the Halifax Regional Municipality:  
\$11,000
25. Include all additional documentation you feel is necessary and any letters of support that you feel are of value to your application. Finally, please attach the following documentation to this application in order to be considered for funding:
  - Your “Terms of Reference” or “Operating Guidelines”
  - A proposed operating budget for your event
  - A complete contact list of your organizing board or committee
  - A copy of the most recent approved minutes of your organizing board or committee
  - Any information on the possible economic impact of your event on the HRM
27. Successful applicants will receive 80% of their grant up front and the remaining 20% will be forwarded to them after the event is completed and once all HRM Municipal Services (if applicable) are paid for and a final Evaluation Report and Financial Statement is received.

## A Brief History of the Scotia Festival of Music

**Scotia Festival of Music**, now in its 29<sup>th</sup> year, is a two-week celebration of the art of music performance which takes place in Halifax in late May, early June. It has two purposes of equal importance. The first is to give a series of solo recitals, chamber music and orchestral concerts. The second is to inspire "Young Artists" (young professionals and advanced music students who enrol in Scotia Festival's two-week intensive study program), music teachers, students, and members of the public by presenting master classes, coaching sessions, and lectures by the Guest Artists.

Although concerts in the 1980's were of the highest level with artists such as Yehudi Menuhin and Alexander Schneider, violin, Walter Trampler, viola, Joel Quarrington, bass, Julius Baker, flute, the Orford Quartet, and Maureen Forrester, contralto, it was not until 1991 with Pierre Boulez as Guest Music Director that Scotia Festival of Music became internationally known.

The tour with Boulez and his 36 member Ensemble InterContemporain from Paris, to Toronto-Ottawa-Montreal-Quebec City-Halifax organized by Scotia Festival presenting concerts, master classes, and lectures, touched the life of every caring musician in Canada and changed the lives of many people.

The tour ended in Halifax where the Ensemble stayed for one week performing and teaching and Boulez stayed an additional week to teach and conduct. It was the first year we had a composer-in-residence and we have continued to do so ever since. Other composers include Alexina Louie, R. Murray Schafer, Peter Lieberson, Alexander Tchaikovsky, Oliver Knussen, Joan Tower, Christos Hatzis, and Philip Glass.

Scotia Festival has commissioned works by R. Murray Schafer (his 6th quartet), Peter Lieberson, Joan Tower, Christos Hatzis, Philip Glass, Scott Macmillan, Emily Doolittle, and Marc-André Hamelin.

In 1990, Scotia Festival of Music began a student sponsorship program. Under this **Sponsor-a-Student Program, SAS**, students pay \$5 of a \$20 student ticket and corporations or individuals pay the remaining \$15. The student is told who his or her sponsor is and is asked to write and thank them.

In thirteen years, Scotia Festival has had over 5000 young people attend Scotia Festival events under this program exposing them to music and building audiences for the future. In 2001, 919 students were sponsored in comparison with 139 in 1997. This program is a very successful way to develop audiences and everyone wins. The students are introduced to classical music, the sponsor, for his or her \$15 donation, gets a thank you letter often accompanied by a drawing and Scotia Festival of Music receives the full student purchase price for each ticket.

In 1997 Scotia Festival of Music created **The Poster Painting Project**. A woodwind quartet was hired to play in the school gymnasium while 200 students from grades primary to six painted what they heard, felt or saw. Under the SAS Program sponsorship money was secured to pay for the paint supplies, the musician's fees, and to cover the full price of admission for the grades 5 and 6 students to come to a Scotia Festival concert. Again, the students were asked to write and thank their sponsors. Scotia Festival each year will select a new school and repeat this project again introducing young people to music and building audiences for the future.