

Item No. 10.3.1
Halifax Regional Council
April 24, 2012

TO: Mayor Kelly and Members of Halifax Regional Council

SUBMITTED BY: Original Signed
Councillor Sue Uteck, Chair, Special Events Advisory Committee

DATE: April 12, 2012

SUBJECT: HRM Non-Annual Events & Event Infrastructure Report

ORIGIN

The March 1, 2012 staff report; March 28, 2012 and April 11, 2012 Special Events Advisory Committee meetings.

RECOMMENDATION

It is recommended that Halifax Regional Council

1. Approve the 2012/13 Non-Annual grants from the Marketing Levy Special Events Reserve (Q315) for a revised total of \$276,460 (an increase of \$34,750) as per the following amendments:
 - a) \$14,500 for Epic Dartmouth, an increase of \$14,500
 - b) \$100,000 for Canada vs. Russia Junior Hockey Series conditional upon Halifax winning the bid as host city; an increase of \$17,500
 - c) \$10,000 for Memorial Tower (Dingle) – 100th Anniversary, an increase of \$2,750
2. Approve the infrastructure funding totalling \$50,000, as identified in Attachment 3 of the March 1, 2012 staff report,
3. Defer consideration of Titanic 100 – Part 2 until further information is provided; and
4. Decline the application for funding request from the Hal-Con Sci-Fi Fantasy Convention, Halifax Anthem Showcase, Nocturne: Art at Night, and the Maritime Fiddle Festival.

BACKGROUND

As per the March 1, 2012 staff report.

DISCUSSION

The Special Events Advisory Committee reviewed the March 1, 2012 staff report and at their April 11, 2012 meeting made the following amendments:

Epic Dartmouth (Triathlon)

Upon review of the staff report and score sheet associated with the Epic Dartmouth event, the Committee agreed to move the event from the Non-Qualified Events section (non qualified due to a score of 40/100 which was below the required 50/100),and; recommend an award of \$14,500 as per the following revisions to the score sheet:

- a) Under the Criteria section **Free or Low Costs (if gated)** the score was increased by **5** for a total of **10/15** as the Committee considered the event as a **Combination** under the Values section of the score sheet as the event is free to the public although there is a cost to participants.
- b) Under the Criteria section **Community Engagement**, the score was increased by **3** for a total of **8/12** as the Committee agreed that the Values section for **Identity** be increased by **1** for a total of **2/3** as this is the first such event in eastern Canada and will give more exposure to HRM; the **Culture** section be increased by **1** for a total of **1/3** as a hockey event obtained 1/3 for this section; and the **Diversity** section be increased by **1** for a total of **2/3** as there may be a large segment of the population who may not be active but may participate in the event celebrating sports and learn what activities are available in their community (swim, bike, marathon). The amendments give a final sector total of **8/12**.
- c) Under the Criteria section **Tourism Impact** the score was increased by **2** for a total of **5/8** as the Committee recommended the Values section for **Reputation** be increased by **1** for a total of **3/4**; and the **Exposure** section be increased by **1** for a total of **2/4** for a final sector total of **5/8**.

See amended score sheet for Epic Dartmouth attached as Attachment 1 to this report.

The final score for the Epic Dartmouth event was now 50/100, an increase of 10 points, which gave a percentage of grant award proposed of 25% for a recommended grant award of **\$14,500**. The Special Events Advisory Committee recommends that Halifax Regional Council approve an award of \$14,500 to Epic Dartmouth.

Canada vs Russia Junior Hockey Series

Upon review of the staff report and consideration of the presentation given at the March 28, 2012 Special Events Advisory Committee meeting, the Committee agreed to increase the proposed award by **\$17,500** for a total of **\$100,000**, conditional upon Halifax winning the bid to be the host city. \$100,000 is the minimum required to be in the bidding for the event. The Special Events Advisory Committee recommends an increase of \$17,500 for a total award of \$100,000 conditional upon Halifax winning the bid for host city.

Memorial Tower (Dingle) 100th Anniversary

Upon review of the staff report and the presentation provided at the April 11, 2012 Special Events Advisory Committee meeting, the Committee recommends an increase of \$2,750 for a total award of \$10,000 based on an exceptional circumstances wherein the score sheet evaluation warranted the event a proposed award of \$7,400, however; that amount exceeded the funding limitations of the Marketing Levy Special Event Reserve Fund as outlined on pages 17 and 18 of the March 27, 2007 Civic Events Policy and Granting Framework. The policy states that the maximum amount that could be awarded is 1/3 of the program costs associated with the event. Program costs associated with the Memorial Tower (Dingle) -100th Anniversary event are \$21,750, therefore; \$7,250 was the maximum award staff could propose.

The Committee discussed and agreed that \$10,000 would be warranted considering the event is a significant anniversary of an important municipally owned National Historic site built to commemorate the anniversary of Representative Government in Nova Scotia, and; for the following additional exceptional circumstances:

- lack of parking around the largely residential neighbourhood at the Sir Sanford Fleming public park area necessitates the use of a Metro Transit shuttle service which increases costs for the event
- due to the largely residential area, police presence at three locations is required during the event which increases costs for the event

For the reasons outlined above, the Committee recommends that Halifax Regional Council approve a grant award of \$10,000 for the Memorial Tower (Dingle) – 100th Anniversary event.

Staff concurs with the Committee's recommendation as their decision falls within the Marketing Levy Special Events Reserve (MLSER) Business Case's exceptional circumstance clause as per Attachment 3 of the March 27, 2007 Civic Events Policy and Granting Framework.

BUDGET IMPLICATIONS

The proposed amendments to the recommendation #1, as presented to SEAC on April 11, will not increase the amount to be withdrawn from the Q315, Marketing Levy Special Events Reserve, as these awarded amounts are part of the total 2012/13 budgeted amount to be withdrawn from the reserve. This has been confirmed with Finance staff.

Budget Summary Q315 Reserve:

Projected Balance March 31, 2012	\$ 718,757
2012/13 Budgeted Revenue	\$ 1,251,087
Projected Interest	\$ 7,878
Budgeted Withdrawals	<u>\$(1,654,000)</u>
(recommendations are included within this amount)	
Projected Balance March 31, 2013	\$ 323,722

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

The Special Events Advisory Committee is comprised of four citizens at large, four elected officials and four representatives from the following organizations: Metro Chamber of Commerce, Destination Halifax, Hotel Association of Nova Scotia and Greater Halifax Partnership. The meetings of the Special Events Advisory Committee are open to the public.

ALTERNATIVES

1. Halifax Regional Council may choose not to approve the recommendations as outlined on the cover page of this report. This is not the recommended option.

ATTACHMENTS

1. Revised Score Sheet for Epic Dartmouth.
2. March 1, 2012 HRM Non-Annual Events & Event Infrastructure staff report.
3. Pages 16 – 18 of the March 27, 2007 Civic Events Policy and Granting Framework re: Reserve Business Case – Marketing Levy Special Events Reserve (Q315) Funding Limitations/Funding Requirements.

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: Chris Newson, Legislative Assistant, 490-6732

Attachment 4

MLSER Event Score Sheet

Applicant: Epic Dartmouth

Criteria	Score	Values	
Free or low costs (if gated)	5 / 15 ✓ 10 / 15	Free = 15 Combination = 10 ✓ free to public / cost to participant Low Cost = 5 (Free but High Cost to Enter)	+5
Attendance (Event Size)	3 / 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)	3 / 9	Prime Season (July to Sept.) = 3 Shoulder Season (Apr. – June & Oct.) = 6 Off Season (Nov. To Mar.) = 9	
Primary Event Location	6 / 9	Urban = 3 Mixed = 6 Rural = 9	
Event Sustainability - Partnership Support - Volunteers - Event delivery experience	8 / 12	Partnership support – Provincial, Federal & corporate – 2/4 Volunteers – Number of volunteers, training, capacity, etc. – 4/4 Experience – Proven track record in Halifax, goals, etc. – 2/4	
Community Engagement - Legacy (social, cultural, infrastructure) - HRM's Identity - Culture - Diversity	5 / 12 ✓ 8 / 12	Legacy – Appropriateness, scale, etc. – 3/3 Identity – Physical attributes, heritage, etc. – 1/3 Culture – Inclusive, creative, etc. – 0/3 1/3 ✓ Diversity – Inclusive, innovative, etc. – 1/3 2/3 ✓	+3
Tourism Impact - HRM Exposure - Reputation	3 / 8 ✓ 5 / 8	Reputation – Event delivery, hospitality – 2/4 3/4 ✓ Exposure – TV, radio, paper, online, etc. – 1/4 2/4 ✓	+2
Economic Impact - Spectators from outside HRM - ROI - Local expenditures - Employment - Budget	7 / 20	Number of tourists – 2/8 General Economic Impact – 1/4 Buying local products, equipment, services, etc. – 3/4 Size/ fiscal management/ appropriateness of budget/ low admin O/H – 1/4	
Final Total	40/100 50/100		710

Total points: 40

50

Percentage of grant award proposed: 0% 25%

Recommended grant award: \$0 \$14,500



P.O. Box 1749
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Special Events Advisory Committee
April 11, 2012

TO: Special Events Advisory Committee

SUBMITTED BY: Original Signed

Brad Anguish, Director, Community & Recreation Services

DATE: March 1, 2012

SUBJECT: HRM Non-Annual Events & Event Infrastructure Report

ORIGIN

HRM's biannual Civic Event Granting Program solicited several grant applications during Phase One (Oct-Jan) of the process which require the consideration of the Special Events Advisory Committee before recommendations are tabled with Regional Council.

RECOMMENDATION

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

1. Approve the 2012/13 Non-Annual grants for a total of \$241,710 and infrastructure funding totalling \$50,000 as identified in Attachment 3 from the Marketing Levy Special Events Reserve (Q315);
2. Defer consideration of Titanic 100 – Part 2 until further information is provided; and
3. Decline the application for funding request from the Hal-Con Sci-Fi Fantasy Convention, Halifax Anthem Showcase, Nocturne, Maritime Fiddle Festival and Epic Dartmouth for reasons outlined in the staff report.

EXECUTIVE SUMMARY

This report outlines the recommended grant allocations for the 2012/2013 Non-Annual Event Program and the 2012/2013 Event Infrastructure Program. Each program is funded through the Marketing Levy Special Events Reserve (MLSER) and governed by the Special Events Advisory Committee (SEAC). A detailed overview and evaluation of each applicant is provided within the report. Among the 14 applications, support for 8 events is recommended, 5 events are not recommended for support, and 1 event requires further clarity.

BACKGROUND

The MLSER is an operating reserve funded through the hotel tax levy. HRM receives 40% of the total revenue generated from the hotel tax levy for the purposes of event and economic development. There are four event grant programs that HRM currently operates: 1) Hallmark Events; 2) Non-Annual Events; 3) Summer Festival Events; and 4) Festivals and Events. Through the MLSER, HRM provides financial support to the event grant programs with an anticipated total budget of approximately \$1.6 million for 2012/2013.

SEAC oversees and governs the four event programs and makes recommendations to Regional Council. Staff undertakes the grant application and evaluation process which is described in Attachment 1. All recommendations respecting the allocations of the MLSER are guided by the Civic Event Granting Framework and Policy and the MLSER Reserve Business Case. The Non-Annual Event Program supports Tourism, Sporting and Major Civic Celebration events. Detailed information on the programs and event categories is outlined in Attachment 2.

DISCUSSION

This report will assist SEAC in its deliberations respecting the Non-Annual grants applications for 2012-2013 to be funded through the MLSER. The report also provides staff's recommended allocation for the Event Infrastructure program.

Applicant Eligibility and Qualification:

To be eligible for event funding, applicants' events are to be non-annual and the proposed event must fall within one or more of the event program and categories outlined in Attachment 2. Events that require a bidding process are not considered annual because the event has to be awarded and therefore these events can be considered eligible in subsequent years. Upon determining eligibility, each event is assessed to determine which, if any, funding grant program it may qualify for consideration. Additionally, events must score 50 or greater in order to qualify for funding.

As part of the review process, SEAC and Council may also consider matters beyond the direct policy framework, such as delinquent or outstanding monies owed to HRM, event quality and image, event organizer's capacity and experience, and event organizer's governance structure. SEAC and Council may also consider matters related to other municipal supports - either from another grant program or capital investment in infrastructure required to support the event.

Following the review of all applications, the proposed events fall into one of the following categories:

- Non-Eligible Events
- Applications Requiring Additional Information
- Non- Qualified Events
- Qualified Events

A. *Non-Eligible Events*

Following the review of the application, staff have identified four event's that do not qualify for grant support. These events are as follows:

1. *Hal-Con Sci-Fi*

This event is proposed for October 26-28, 2012, at the World Trade & Convention Centre, Halifax. The event is described as a central gathering with a main stage, break-out rooms, educational sessions, gaming, live demonstrations, costume contest, vendor's workshops, featured authors and entertainment. An estimated 6,750 people will participate in the event and the grant request was for \$40,000. The Civic Event Granting Framework and Policy does not support competitions, dinners and banquets associated with conferences where the focus of the program is on registered delegate participation. Therefore, since the Hal-Con Sci-Fi Event is structured as a conference/convention, it is recommended that the Hal-Con Sci-Fi Fantasy Convention application not be advanced.

2. *Halifax Anthem Showcase*

This event is proposed for August 15 or 18, 2012, at the Halifax Waterfront, Halifax. The event is described as a showcase of songwriters celebrating the history and future of Halifax through original compositions featured online and via social/ multimedia and then at the Showcase event which would be broadcasted online. An estimated 5,000 people will attend the event and the grant request was for \$80,000. As per the Civic Event Granting Framework and Policy, HRM will support national or international caliber tourism events. These events are large, compelling to a major market, encourage multi-day visits, and have potential for high expenditures, economic impact and international exposure. The proposed Halifax Anthem Showcase does not meet the criterion of a national or international tourism event. Therefore, it is recommended that the Halifax Anthem Showcase application not be advanced.

3. *Nocturne: Art at Night*

This event is proposed for Saturday, October 13, 2012, at various locations throughout HRM. Nocturne aims to showcase the local arts community and positions HRM as a creative and dynamic city through hosting numerous independent projects and anchor sites. It is estimated to attract over 25,000 participants and the grant request was for \$45,000. As per the Civic Event Granting Framework and Policy, the Non-Annual Event Grant program supports events which occur on an infrequent basis. The Nocturne Art at Night received an Event Grant in the 2011/12 fiscal period, thus is not eligible to receive an Event Grant in the 2012/13 fiscal period.

Therefore, it is recommended that Nocturne: Art at Night application not be advanced.

4. *Maritime Fiddle Festival*

This event is proposed for July 5 - 9, 2012, at the Prince Andrew High School and NSCC Akerley Campus, Dartmouth. Approximately 2,700 people are expected to attend this event and the grant request is for \$12,000. The event program consists of fiddle competitions, concerts, workshops, jamborees and kitchen parties. As per the Civic Event Granting Framework and Policy, Non-Annual Event Grant program supports events which occur on an infrequent basis. The Maritime Fiddle Festival received an Event Grant in the 2011/12 fiscal period, thus is not eligible to receive an Event Grant in the 2012/13 fiscal period. It is recommended that the Maritime Fiddle Festival application not be advanced.

B. *Applications Requiring Further Information*

Periodically, an application is unclear and may require additional information to ensure staff can effectively evaluate the proposal. The following application requires additional information:

1. *Titanic 100 – Part*

This event is proposed for September 2012 in downtown Halifax. The expected attendance is approximately 20,000 people and the funding requested is \$100,000. The event proposes two events to commemorate the 100th anniversary of the sinking of the Titanic. The first event is a Titanic Trans-Atlantic Celtic Concert and the second is a Titanic Film Festival. Staff has identified a number of questions requiring clarification before this application proceeds to the next stage of the granting process. Clarity is needed around the two proposed events as HRM already committed a grant award of \$57,500 for both a Celtic Concert and Film Festival as part of the original Titanic application.

C. *Non-Qualified Events*

There may be events which are eligible for funding but do not score enough points to qualify for the respective funding:

1. *Epic Dartmouth*

This triathlon event is proposed for July 1, 2012, in Central Dartmouth (bicycle portion goes throughout rural HRM). The expected attendance size is 8,500 and the funding requested is \$58,000. The event will operate three races, AQUA Dartmouth (bike & swim), EPIC Dartmouth (bike, swim, half marathon) and IRON Dartmouth (bike, swim, full marathon). During the event there will be a Celebration of Sport, where groups can present their organization to the public and free entertainment will occur on the event stage.

Based on information contained within the application, staff have evaluated the EPIC Dartmouth and identified a score of 40 points out of 100 on the MSLE Scoring Sheet. Staff recommends no grant funding, as the event did not score a minimum of

50 points.

D. *Qualified Events*

Attachment 3 provides a summary of the proposed funding amounts for the various events which are recommended for grant awards. A detailed description of each event is outlined in the following discussion and an evaluation sheet for each is provided as Attachment 4.

Major Sporting Events

The following Major Sport Event applications have been received within the first intake of the 2012-2013 grant season:

1. *FIVB Beach Volleyball Junior World Championships*

Grant requested: \$225,000

Grant proposed: \$114,750

This event is proposed for August 28 – September 2, 2012, at the Salter Block, Halifax Waterfront. 64 teams from over 30 countries are expected to attend with an estimation of over 20,000 spectators. The estimated economic benefit to HRM is over \$2,000,000 with \$600,000 being spent locally on salaries, rentals and marketing. The grant is requested for operating expenses including marketing locally, nationally and internationally. The applicant has previously received a grant of \$51,000 in 2011. This event is eligible for funding for a second year since the event is selected through a bidding process, and therefore is not considered annual under the Civic Event Granting Framework and Policy.

Based on information contained within the application, staff have evaluated the FIVB Junior World Championships and identified a score of 63 points out of 100 on the MSLER Scoring Sheet. Strengths of this application include an experienced event organizer with a proven local track record at delivering successful major outdoor sporting events, and this event aligns with the strategic direction of the Event Strategy. Additionally, the application appears to have a strong economic business case.

2. *Canada vs. Russia Junior Hockey Series*

Grant Requested: \$150,000

Grant Proposed: \$82,500

This event is proposed for August 12 – 18, 2012, in Halifax. The event is hosting two world junior team hockey games that commemorate the 40th Anniversary of the Canada Russia 1972 Summit Series. Team Russia would travel to Canada, after Canada would play two games in Russia. This event would include possible 1972 alumni activity, Team Canada public autograph sessions, a pep rally and connection through Hockey Nova Scotia for player and coach development. The grant request is to cover operational expenses and rights fees for securing the event.

Based on information contained within the application, staff have evaluated the Canada vs Russia Junior Hockey Series and identified a score of 65 points out of 100 on the MSLER Scoring Sheet. Strengths of this application include the strong reputation Halifax has for hosting international hockey events and the proposed business case does suggest significant economic impacts.

3. *2012 Canadian Chess Championship*

Grant Requested: \$10,000

Grant Proposed: \$2,700

This event is proposed for May 19 – 21, 2012, at St. Mary's University, Halifax. The estimated attendance of the event is 400 people and will include 12 students from each province. The application estimated a direct economic impact to HRM of \$150,000 and estimates over 500 hotel nights. The grant is requested to cover operational costs of accommodations.

Based on information contained within the application, staff have evaluated the 2012 Canadian Chess Championship and identified a score of 51 points out of 100 on the MSLE Scoring Sheet. Strengths of this application include showcasing Halifax to a diverse attendance, strong organizer experience and a fiscally responsible budget.

4. *2012 Canadian Sprint Canoe Kayak Championship*

Grant Requested: \$4,000

Grant Proposed: \$2,360

This event is proposed for August 22 - 26, 2012, at Lake Banook, Dartmouth. The event will utilize 225 volunteers and the estimated attendance is 10,000 people. Over 450 individual and team events will take place during the five days of competition. The opening and closing ceremonies, as well as all the races are free to the public to watch. The championship estimates there will be upwards of 7,500 hotel nights. The grant is requested to enhance the event overall for athletes and spectators, by increasing event presentations and promotion.

Based on information contained within the application, staff have evaluated the 2012 Canadian Sprint Canoe Kayak Championships and identified a score of 67 points out of 100. Strengths of this application include celebrating HRM's physical assets/ attributes, increasing HRM as a national/ international sprint canoe and kayak host, event organizers have a proven local event track record and the proposed business case suggests strong economic impacts.

Major Tourism Events

The following Tourism Event applications have been received within the first intake of the 2012-2013 grant season:

1. *Prismatic*

Grant requested: \$30,000

Grant proposed: \$7,500

This event is proposed for September 13-30, 2012, at various downtown Halifax locations. The attendance of participants and spectators is estimated to be over 7,000. The event is a bi-annual national arts festival entering into its third year and presents works in dance, theatre, music, visual arts, spoken work, film, photography and performance art. Prismatic celebrates and showcases the work of aboriginal and culturally diverse artists. The event's sponsor hotel has over 150 hotel nights booked during the event.

Based on information contained within the application, staff have evaluated and determined that Prismatic scored 50 points out of 100 on the MLSER Scoring Sheet. Strengths of this application are that event satisfies a strategic area of the Event Strategy, celebrates local traditions and identity and is a culturally diverse event.

Major Civic Celebrations

The following Major Civic Celebration applications have been received within the first intake of the 2012-2013 grant season:

1. *Grand Encampment – War of 1812 200th Anniversary*

Grant requested: \$50,000

Grant proposed: \$21,500

This event is proposed for August 30 – September 2, 2012, at various locations and at the Halifax Citadel. The expected attendance for all events is 20,000 people. As part of the event's re-enactment, there will be interpretive displays, interactive sites, period tented camps erected for demonstrations of family life and cooking, mock battles and military displays (grounds of Citadel Hill, Grand Parade, Point Pleasant Park and the boardwalk). The event's mock battles are free to watch and a regular fee will still be charged at Citadel Hill during the week, with no extra charges for the activities within the site. Parks Canada will be providing in-kind support and assisting with promotion of this event.

Based on information contained within the application, staff have evaluated and determined a score of 59 points out of 100. Strengths of this application are that it aligns with a strategic area of the Event Strategy, celebrates an important anniversary and pays homage to HRM's heritage and traditions.

2. *Memorial Tower (Dingle) 100th Anniversary*

Grant requested: \$20,000

Grant proposed: \$7,250

This event is proposed for August 6, 2012 at Sir Sandford Fleming Park, Halifax. The estimated attendance for this event is 1,400 people. The event will feature full access to the tower, historical displays, musicians, and historical walks, actors in period costumes, free food and family entertainment. This event is free to the public.

Based on information contained within the application, staff have evaluated and determined a score of 56 points out of 100. Strengths of this application are that this event satisfies a strategic area of the Event Strategy and celebrates HRM's heritage and tradition. The Memorial Tower (Dingle) 100th Anniversary qualified for a grant award of \$7,400, however, the MLSER Reserve Business Case funding criteria limits the total funding for event to 1/3 of program costs. The total proposed budget for this event was \$21,750, therefore the event is eligible for a maximum grant award of \$7,250.

3. *Neptune Theatre 50th Anniversary*

Grant requested: \$7,000

Grant proposed: \$3,150

This event is proposed for July 2012, along Argyle Street, Halifax. The estimated

attendance for this event is over 2,500 people. The event is planned to be a family street party that will include two live performance areas, archival displays and open house public performances inside Neptune Theatre. This event is free to the public.

Based on information contained within the application, staff have evaluated and determined a score of 60 points out of 100. Strengths of this application are that this event satisfies a strategic area of the Event Strategy and celebrates an important cultural landmark in HRM.

Event Infrastructure Program

The Event Infrastructure Program, as stated in the Reserve Business Case, supports miscellaneous expenses such as maintenance, upgrades, and development of HRM owned and operated event infrastructure (i.e., HRM Float), equipment and sites. This funding program can be valued up to 10% of the MLSER budget in any given budget cycle.

In 2011, the Event Infrastructure Program was approved for \$90,000. This approval was based on the traditional \$40,000 request for regular maintenance and an increase of \$50,000 for the creation of a new HRM float.

For 2012, \$50,000 is recommended to support the Event Infrastructure Program. This recommendation is based on the \$40,000 regular maintenance request and an increase of \$10,000 for new french barricades. The \$40,000 will be used for the storage, maintenance and repair of the HRM float, flag infrastructure and event equipment, whereas the additional \$10,000 will be used to order 100 french barricades lost to attrition. These barricades will be essential in meeting the requirements from the usual summer events plus the increase from Tall Ships.

BUDGET IMPLICATIONS

All recommendations are subject to approval of the proposed 2012/13 budget and availability of MLSER reserve funds. Projected contributions and withdrawals are as follows:

Budget Summary Q315 Reserve:

Projected Balance March 31, 2012	\$ 718,757
Plus: Marketing Levy proposed revenue for 12/13	\$1,251,087
Plus: 12/13 Projected Interest	\$ 7,878
Less: 11/12 Second Intake Event Grants (12/13 events)	(\$ 524,500)
Less: 12/13 Hallmark Event Grants	(\$ 345,000)
Less: 12/13 Non-Annual Event Grants (recommendation 1)	(\$ 291,710)
Less: 12/13 Event Infrastructure (recommendation 1)	(\$ 50,000)
Projected Reserve Balance March 31, 2013	<u>\$ 766,522</u>

FINANCIAL MANAGEMENT POLICIES/BUSINESS PLAN

This report complies with the Municipality's Multi-Year Financial Strategy, policies and procedures regarding withdrawals from the utilization of Project and Operating reserves, as well as any relevant legislation and is subject to the approval of the proposed 2012/13 Reserve budget.

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 may choose to amend the recommendations as outlined.

Alternative 2: SEAC may choose not to approve the recommendation as outlined.

ATTACHMENTS

Attachment 1: Grant Application and Evaluation Process

Attachment 2: Event Programs & Categories

Attachment 3: Proposed Funding Amounts

Attachment 4: MLSER Scoring 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: Paul Forrest, Event Coordinator, Community Development & Partnerships, 490-6979

Original Signed

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

Original Signed

Financial Approval by: Greg Keefe, CMA – A/Director of Finance and Information Technology/CFO 490-6308

Attachment 1

Grant Application and Evaluation Process

There are two intake processes for all HRM events granting programs. The first intake process begins the last Friday of October and closes the last Friday of January. The second intake process opens the last Friday in May and closes the last Friday of August. Grant applications are located on the HRM web page with accompanying instructions each intake. The application process requires several steps until a final decision is made by Regional Council, as outlined below:

Step One: Grant Application Submission

Candidate applications are submitted. Upon receipt, staff forwards a letter confirming receipt of the application. An application reference number is provided.

Step Two: Applications Scoring and Presentations

Applications are reviewed to determine eligibility for the respective grant program. Staff analyzes and scores each application accordingly (eligible events must reach the minimum score to be recommended a grant award). Award recommendations are developed within the allocated budget based on a grant allocation formula and capping system shown in Table 1. Approved applicants requesting over \$20,000 in funding are contacted and required to make a presentation to the Special Events Advisory Committee.

Table 1: MLSER Granting Cap Amount Totals		
Event Category		Grant Cap Amount
Hallmark		
	Hallmark	\$100,000
Sport		
	National	\$50,000
	International	\$250,000
	Commercial	\$50,000
Tourism		
	Major	\$100,000
	Professional Festival	\$50,000
Major Civic Celebrations		
	Civic Celebration	\$25,000
	Anniversary	\$25,000

Step Three: Special Events Advisory Committee Deliberations

Upon review of all applications, and hearing presentations, SEAC prepares and forwards its recommendations to Regional Council. A committee report is tabled for Council's consideration.

Step Four: Regional Council Decision

Upon review of the recommendations provided by the SEAC, Regional Council makes a final decision on the proposed grants. Successful and unsuccessful grant applicants are officially notified by letter of the grant amount awarded.

Attachment 2

Event Programs & Categories

The Reserve Business Case as approved by Regional Council in 2007 acts as the governing document for funding allocations from the Marketing Levy Special Events Reserve (MLSER). The purpose of the Reserve Business Case is to provide funding to attract and host exceptional tourism, culture, and heritage events that are typically national or international in calibre, and that occur on an infrequent basis, where HRM plays a leading and/or hosting role.

The Event Infrastructure Program, as stated in the Reserve Business Case, supports miscellaneous expenses such as maintenance, upgrades, and development of HRM owned and operated event infrastructure (i.e., HRM Float), equipment and sites. This funding program can be valued up to 10% of the MLSER budget in any given budget cycle.

The Civic Event Granting Framework and Policy was also approved by Regional Council in 2007 and guides all decisions respecting the allocation of the MLSER. The following policies were identified for funding and are referred to as the Non-Annual Event Categories:

Non-Annual Event Categories

- Sporting Events: large, compelling, major market events with high expenditure potential. Such (sporting) events also have a high potential for national and international exposure and the ability to encourage multi-day visits. A grant program for local sporting events is not included.
- Tourism Events: 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.
- Major Civic Celebrations: special and significant major civic events that mark important celebrations, memorials, commemorations, anniversaries, or significant functions.

Attachment 3
Proposed Funding Amounts

PROPOSED FUNDING AMOUNTS			
Marketing Levy Special Events Reserve (Q315)			
Event Name	Request	Score	Proposed
Sporting Events			
FIVB Junior World Championships	225,000	63	114,750
Canada vs Russia Junior Hockey Series	150,000	65	82,500
2012 Canadian Chess Championship	10,000	51	2,700
2012 Canadian Sprint Canoe Kayak Championship	4,000	67	2,360
SUBTOTAL	389,000		202,310
Tourism Events			
Prismatic	30,000	50	7,500
SUBTOTAL	30,000		7,500
Major Civic Celebrations			
Grand Encampment – War of 1812 200 th Anniversary	50,000	59	21,500
Memorial Tower 100 th Anniversary - Dingle	20,000	56	*7,250
Neptune Theatre 50 th Anniversary	7,000	60	3,150
SUBTOTAL	77,000		\$31,900
TOTAL NON-ANNUAL EVENTS			
Event Infrastructure			
Infrastructure Maintenance and Upgrades	50,000		50,000
TOTAL INFRASTRUCTURE	50,000		50,000
GRAND TOTAL MLSER PROPOSED	546,000		291,710

*Grant award was capped at \$7,250 as per the MLSER Reserve Business Case's 1/3 budget funding limitation

Attachment 4

MLSER Event Score Sheet

Applicant: Epic Dartmouth

Criteria	Score	Values
Free or low costs (if gated)	5 /15	Free = 15 Combination = 10 Low Cost = 5 (Free but High Cost to Enter)
Attendance (Event Size)	3 /15	<i>Less than 10,000 = 3</i> 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)	3 /9	<i>Prime Season (July to Sept.) = 3</i> Shoulder Season (Apr. – June & Oct.) = 6 Off Season (Nov. To Mar.) = 9
Primary Event Location	6 /9	Urban = 3 <i>Mixed = 6</i> Rural = 9
Event Sustainability - Partnership Support - Volunteers - Event delivery experience	8 /12	Partnership support – Provincial, Federal & corporate – <i>2/4</i> Volunteers – Number of volunteers, training, capacity, etc. – <i>4/4</i> Experience – Proven track record in Halifax, goals, etc. – <i>2/4</i>
Community Engagement - Legacy (social, cultural, infrastructure) - HRM's Identity - Culture - Diversity	5 /12	Legacy – Appropriateness, scale, etc. – <i>3/3</i> Identity – Physical attributes, heritage, etc. – <i>1/3</i> Culture – Inclusive, creative, etc. – <i>0/3</i> Diversity – Inclusive, innovative, etc. – <i>1/3</i>
Tourism Impact - HRM Exposure - Reputation	3 /8	Reputation --Event delivery, hospitality – <i>2/4</i> Exposure – TV, radio, paper, online, etc. – <i>1/4</i>
Economic Impact - Spectators from outside HRM - ROI - Local expenditures - Employment - Budget	7 /20	Number of tourists – <i>2/8</i> General Economic Impact – <i>1/4</i> Buying local products, equipment, services, etc. – <i>3/4</i> Size/ fiscal management/ appropriateness of budget/ low admin O/H – <i>1/4</i>
Final Total	40/100	

Total points: 40

Percentage of grant award proposed: 0%

Recommended grant award: \$0

Attachment 4

MLSER Event Score Sheet

Applicant: FIVB Volleyball

Criteria	Score	Values
Free or low costs (if gated)	10 /15	Free = 15 Combination = 10 Low Cost = 5
Attendance (Event Size)	6 /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)	3 /9	<i>Prime Season (July to Sept.) = 3</i> Shoulder Season (Apr. – June & Oct.) = 6 Off Season (Nov. To Mar.) = 9
Primary Event Location	3 /9	Urban = 3 Mixed = 6 Rural = 9
Event Sustainability - Partnership Support - Volunteers - Event delivery experience	12 /12	Partnership support – Provincial, Federal & corporate – 4/4 Volunteers – Number of volunteers, training, capacity, etc. – 4/4 Experience – Proven track record in Halifax, goals, etc. – 4/4
Community Engagement - Legacy (social, cultural, infrastructure) - HRM's Identity - Culture - Diversity	9 /12	Legacy – Appropriateness, scale, etc. – 3/3 Identity – Physical attributes, heritage, etc. – 1/3 Culture – Inclusive, creative, etc. – 2/3 Diversity – Inclusive, innovative, etc. – 3/3
Tourism Impact - HRM Exposure - Reputation	7 /8	Reputation –Event delivery, hospitality – 3/4 Exposure – TV, radio, paper, online, etc. – 4/4
Economic Impact - Spectators from outside HRM - ROI - Local expenditures - Employment - Budget	13 /20	Number of tourists – 4/8 General Economic Impact – 3/4 Buying local products, equipment, services, etc. – 4/4 Size/ fiscal management/ appropriateness of budget/ low admin O/H – 2/4
Final Total	63/100	

Total points: 63

Percentage of grant award proposed: 51%

Recommended grant award: \$114,750

Attachment 4

MLSER Event Score Sheet

Applicant: Canada vs Russia Junior Hockey Series

Criteria	Score	Values
Free or low costs (if gated)	10 /15	Free = 15 Combination = 10 Low Cost = 5
Attendance (Event Size)	6 /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)	3 /9	Prime Season (July to Sept.) = 3 Shoulder Season (Apr. – June & Oct.) = 6 Off Season (Nov. To Mar.) = 9
Primary Event Location	3 /9	Urban = 3 Mixed = 6 Rural = 9
Event Sustainability - Partnership Support - Volunteers - Event delivery experience	12 /12	Partnership support – Provincial, Federal & corporate – 4/4 Volunteers – Number of volunteers, training, capacity, etc. – 4/4 Experience – Proven track record in Halifax, goals, etc. – 4/4
Community Engagement - Legacy (social, cultural, infrastructure) - HRM's Identity - Culture - Diversity	9 /12	Legacy – Appropriateness, scale, etc. – 3/3 Identity – Physical attributes, heritage, etc. – 3/3 Culture – Inclusive, creative, etc. – 2/3 Diversity – Inclusive, innovative, etc. – 1/3
Tourism Impact - HRM Exposure - Reputation	8 /8	Reputation –Event delivery, hospitality – 4/4 Exposure – TV, radio, paper, online, etc. – 4/4
Economic Impact - Spectators from outside HRM - ROI - Local expenditures - Employment - Budget	13 /20	Number of tourists – 5/8 General Economic Impact – 3/4 Buying local products, equipment, services, etc. – 4/4 Size/ fiscal management/ appropriateness of budget/ low admin O/H – 2/4
Final Total	65/100	

Total points: 65

Percentage of grant award proposed: 55%

Recommended grant award: \$82,500

Attachment 4

MLSER Event Score Sheet

Applicant: Canadian Chess Championship

Criteria	Score	Values
Free or low costs (if gated)	5 /15	Free = 15 Combination = 10 Low Cost = 5
Attendance (Event Size)	3 /15	<i>Less than 10,000 = 3</i> 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)	6 /9	Prime Season (July to Sept.) = 3 <i>Shoulder Season (Apr. – June & Oct.) = 6</i> Off Season (Nov. To Mar.) = 9
Primary Event Location	3 /9	<i>Urban = 3</i> Mixed = 6 Rural = 9
Event Sustainability - Partnership Support - Volunteers - Event delivery experience	6 /12	Partnership support – Provincial, Federal & corporate – <i>2/4</i> Volunteers – Number of volunteers, training, capacity, etc. – <i>2/4</i> Experience – Proven track record in Halifax, goals, etc. – <i>2/4</i>
Community Engagement - Legacy (social, cultural, infrastructure) - HRM's Identity - Culture - Diversity	4 /12	Legacy – Appropriateness, scale, etc. – <i>1/3</i> Identity – Physical attributes, heritage, etc. – <i>0/3</i> Culture – Inclusive, creative, etc. – <i>0/3</i> Diversity – Inclusive, innovative, etc. – <i>3/3</i>
Tourism Impact - HRM Exposure - Reputation	2 /8	Reputation – Event delivery, hospitality – <i>1/4</i> Exposure – TV, radio, paper, online, etc. – <i>1/4</i>
Economic Impact - Spectators from outside HRM - ROI - Local expenditures - Employment - Budget	12 /20	Number of tourists – <i>4/8</i> General Economic Impact – <i>2/4</i> Buying local products, equipment, services, etc. – <i>3/4</i> Size/ fiscal management/ appropriateness of budget/ low admin O/H – <i>3/4</i>
Final Total	51/100	

Total points: 51

Percentage of grant award proposed: 27%

Recommended grant award: \$2,700

Attachment 4

MLSER Event Score Sheet

Applicant: Canadian Sprint Canoe Kayak Championship

Criteria	Score	Values
Free or low costs (if gated)	15 /15	Free = 15 Combination = 10 Low Cost = 5
Attendance (Event Size)	6 /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)	3 /9	Prime Season (July to Sept.) = 3 Shoulder Season (Apr. – June & Oct.) = 6 Off Season (Nov. To Mar.) = 9
Primary Event Location	3 /9	Urban = 3 Mixed = 6 Rural = 9
Event Sustainability - Partnership Support - Volunteers - Event delivery experience	10 /12	Partnership support – Provincial, Federal & corporate – 2/4 Volunteers – Number of volunteers, training, capacity, etc. – 4/4 Experience – Proven track record in Halifax, goals, etc. – 4/4
Community Engagement - Legacy (social, cultural, infrastructure) - HRM's Identity - Culture - Diversity	10 /12	Legacy – Appropriateness, scale, etc. – 2/3 Identity – Physical attributes, heritage, etc. – 3/3 Culture – Inclusive, creative, etc. – 2/3 Diversity – Inclusive, innovative, etc. – 3/3
Tourism Impact - HRM Exposure - Reputation	7 /8	Reputation –Event delivery, hospitality – 4/4 Exposure – TV, radio, paper, online, etc. – 3/4
Economic Impact - Spectators from outside HRM - ROI - Local expenditures - Employment - Budget	13 /20	Number of tourists – 5/8 General Economic Impact – 2/4 Buying local products, equipment, services, etc. – 3/4 Size/ fiscal management/ appropriateness of budget/ low admin O/H – 3/4
Final Total	67/100	

Total points: 67

Percentage of grant award proposed: 59%

Recommended grant award: \$2,360

Attachment 4

MLSER Event Score Sheet

Applicant: Prismatic

Criteria	Score	Values
Free or low costs (if gated)	10 /15	Free = 15 Combination = 10 Low Cost = 5
Attendance (Event Size)	3 /15	<i>Less than 10,000 = 3</i> 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)	3 /9	<i>Prime Season (July to Sept.) =</i> Shoulder Season (Apr. – June & Oct.) = 6 Off Season (Nov. To Mar.) = 9
Primary Event Location	3 /9	<i>Urban = 3</i> Mixed = 6 Rural = 9
Event Sustainability - Partnership Support - Volunteers - Event delivery experience	7 /12	Partnership support – Provincial, Federal & corporate – <i>4/4</i> Volunteers – Number of volunteers, training, capacity, etc. – <i>2/4</i> Experience – Proven track record in Halifax, goals, etc. – <i>3/4</i>
Community Engagement - Legacy (social, cultural, infrastructure) - HRM's Identity - Culture - Diversity	10 /12	Legacy – Appropriateness, scale, etc. – <i>2/3</i> Identity – Physical attributes, heritage, etc. – <i>2/3</i> Culture – Inclusive, creative, etc. – <i>3/3</i> Diversity – Inclusive, innovative, etc. – <i>3/3</i>
Tourism Impact - HRM Exposure - Reputation	6 /8	Reputation –Event delivery, hospitality – <i>3/4</i> Exposure – TV, radio, paper, online, etc. – <i>3/4</i>
Economic Impact - Spectators from outside HRM - ROI - Local expenditures - Employment - Budget	8 /20	Number of tourists – <i>2/8</i> General Economic Impact – <i>2/4</i> Buying local products, equipment, services, etc. – <i>2/4</i> Size/ fiscal management/ appropriateness of budget/ low admin O/H – <i>2/4</i>
Final Total	50/100	

Total points: 50

Percentage of grant award proposed: 25%

Recommended grant award: \$7,500

Attachment 4

MLSER Major Civic Celebration Score Sheet

Applicant: Grand Encampment – War of 1812 200th Anniversary

Criteria	Score	Values
Significant Community Celebration Reflects Policy 3 of the Granting Framework and Section 5 of the Business Case for the MLSER	25/25	High = 25 Medium = 15 Low = 10
Free or low costs Gated vs. Non-Gated	10 /15	Free = 15 Combination = 10 Low Cost = 5
Attendance (Event Size)	4 /10	less than 10,000 = 2 10,000 to 25,000 = 4 25, 000 to 50,000 = 6 50,000 to 250, 000 = 8 greater than 250,000 = 10
% Non-resident participants/spectators	4 /8	greater than 75% = 8 greater than 50% = 6 25 % to 50% = 4 less than 25% = 2
Tourism Period (Seasonality)	3 /10	Off Season (Jan. To Mar.) = 10 Shoulder Season (Apr. To June & Oct. to Dec) = 6 Prime Season (July to Sept.) = 3
Geographic Distribution	6 /10	Urban = 3 Mixed = 6 Rural = 10
Financial Support	3 /6	Provincial Government = 1.5 Federal Government = 1.5 Corporate = 1.5 Community = 1.5
Other Factors: - Legacy - Event and HRM have become inseparable in terms of image - Frequency of event -Provides HRM a competitive advantage	4.5 /6	Traditional, attractiveness, image, cultural awareness raising, 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 ROI Information - Ratio of return to HRM (local investment and HST spin-off)	2 /10	Local expenditures and visitor attraction.
Final Total	58.5/100	

Total points: 59

Percentage of grant award proposed: 43%

Recommended grant award: \$21,500

Attachment 4

MLSER Major Civic Celebration Score Sheet

Applicant: Memorial Tower (Dingle) 100th Anniversary

Criteria	Score	Values
Significant Community Celebration Reflects Policy 3 of the Granting Framework and Section 5 of the Business Case for the MLSER	25/25	High = 25 Medium = 15 Low = 10
Free or low costs Gated vs. Non-Gated	15 /15	Free = 15 Combination = 10 Low Cost = 5
Attendance (Event Size)	2 /10	less than 10,000 = 2 10,000 to 25,000 = 4 25, 000 to 50,000 = 6 50,000 to 250, 000 = 8 greater than 250,000 = 10
% Non-resident participants/spectators	2 /8	greater than 75% = 8 greater than 50% = 6 25 % to 50% = 4 less than 25% = 2
Tourism Period (Seasonality)	3 /10	Off Season (Jan. To Mar.) = 10 Shoulder Season (Apr. To June & Oct. to Dec) = 6 Prime Season (July to Sept.) = 3
Geographic Distribution	6 /10	Urban = 3 Mixed = 6 Rural = 10
Financial Support	3 /6	Provincial Government = 1.5 Federal Government = 1.5 Corporate = 1.5 Community = 1.5
Other Factors: - Legacy - Event and HRM have become inseparable in terms of image - Frequency of event -Provides HRM a competitive advantage	3 /6	Traditional, attractiveness, image, cultural awareness raising, 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 ROI Information - Ratio of return to HRM (local investment and HST spin-off)	1 /10	Local expenditures including rental equipment and talent.
Final Total	56/100	

Total points: 56

Percentage of grant award proposed: 37%

Recommended grant award: \$7,400

Attachment 4

MLSER Major Civic Celebration Score Sheet

Applicant: Neptune Theatre 50th Anniversary

Criteria	Score	Values
Significant Community Celebration Reflects Policy 3 of the Granting Framework and Section 5 of the Business Case for the MLSER	25/25	High = 25 Medium = 15 Low = 10
Free or low costs Gated vs. Non-Gated	15 /15	Free = 15 Combination = 10 Low Cost = 5
Attendance (Event Size)	2 /10	less than 10,000 = 2 10,000 to 25,000 = 4 25, 000 to 50,000 = 6 50,000 to 250, 000 = 8 greater than 250,000 = 10
% Non-resident participants/spectators	2 /8	greater than 75% = 8 greater than 50% = 6 25 % to 50% = 4 less than 25% = 2
Tourism Period (Seasonality)	3 /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	6 /6	Provincial Government = 1.5 Federal Government = 1.5 Corporate = 1.5 Community = 1.5
Other Factors: - Legacy - Event and HRM have become inseparable in terms of image - Frequency of event -Provides HRM a competitive advantage	3 /6	Traditional, attractiveness, image, cultural awareness raising, 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 ROI Information - Ratio of return to HRM (local investment and HST spin-off)	1 /10	Local expenditures.
Final Total	60/100	

Total points: 60

Percentage of grant award proposed: 45%

Recommended grant award: \$3,150

*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