

# CITY OF ORILLIA POLICY MANUAL

Part	4	<b>Finance</b>	<b>4.2.1.2.</b>
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## DEFINITIONS

**Tourist** - For the purpose of this policy, a tourist is defined by the Ontario Ministry of Culture, Tourism and Sport as a visitor travelling greater than 40 km or crosses the Ontario border.

### 1. STATEMENT OF PURPOSE

The City of Orillia recognizes that festivals and events are valuable to the economic and social fabric of the City, building strong partnerships between the not-for-profit, business and cultural sectors. Festivals and events are key to raising the profile of the City, creating opportunities for people to come together to celebrate and enjoy our community's rich natural, cultural and human assets.

The purpose of the Partnership Program for Cultural Festivals and Events is to establish a consistent, equitable and clear funding policy for festivals and events that supports sustainable programming while inspiring creativity and new initiatives.

### 2. PROGRAM OBJECTIVES

The City of Orillia supports investment in community events and festivals as a means of advancing the City's economic, cultural and community objectives. By cultivating community events and festivals that are unique to this area, the municipality aims to:

- Present/promote the distinct, diverse and vibrant character of Orillia to residents and tourists.
- Enhance the quality of life in Orillia by providing opportunities for community participation, social interaction and cultural involvement.
- Contribute to the City's overall economic health.
- Showcase local culture, talent, heritage, artists and/or performers.
- Encourage new and creative partnerships between the private and public sector.
- Improve awareness and visibility of the municipality through destination marketing and branding.
- Enhance the participant experience by supporting innovative and accessible programming.
- Increase the use of municipal facilities, amenities and services.
- Bring the City together to foster a sense of belonging, identity and place.

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### 3. COMPATIBILITY WITH EXISTING POLICY

Unless otherwise stipulated, the *Partnership Program for Cultural Festivals and Events* will conform to the *Grants Committee's Policy Guidelines 4.2.1.1*.

### 4. ELIGIBLE APPLICANTS

**To be eligible**, applicants must (be):

- A registered charity, non-profit organization OR an organization that operates on a not-for-profit basis whereby proceeds of the event are donated back to the community or used to improve the event.
- An organization whereby the majority of board members are from the local area.
- Involved directly with volunteers and their efforts.
- Contribute to the enrichment of community life in the City of Orillia.
- In good financial standing with the City.

### 5. ELIGIBLE FESTIVALS OR EVENTS

**To be eligible**, applicants must demonstrate that the festival or event meets all of the following criteria:

- Is open, accessible and of interest to the public City-wide without membership in a club or group.
- Is based primarily on City property: 75% of activities are held within the City limits.
- Produces a program that clearly meets one of the program's objectives stated in Item 2 of this policy.
- Provides financial statements from the previous year along with a budget for the current year.
- Offers a unique experience not duplicated by any other festival or event.
- Has a diversified revenue base and is sustainable without Council support. The City of Orillia's financial contribution cannot exceed 33% of the event's total operating budget.
- Is supported by the local community through either:
  - secured commitments from other private and public funding sources;
  - partnership programming;
  - volunteer participation.

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## 6. INELIGIBLE APPLICANTS

The following applicants are **NOT eligible** to apply for funding:

- Individuals.
- Crown corporations and government agencies (e.g. school boards, social services, hospitals, business improvement associations, universities, etc.).
- For-profit organizations.
- Political parties, initiatives or candidates.
- Organizations that already receive operating funding from the City of Orillia.
- Grant-making or third-party fundraising organizations.
- Landlord/tenant and condominium corporations.
- Faith-based organizations where services/activities include the promotion and/or required adherence to a faith.
- Organizations with a mission or activities deemed controversial by the City.

## 7. INELIGIBLE ACTIVITIES

The following activities are **NOT eligible** for funding:

- Capital projects (purchase of land/equipment/fixtures, building projects, etc.).
- Sports and recreation tournaments, competitions and contests.
- Conferences, ceremonies, conventions, tradeshow, seminars or workshops.
- Events that are organized primarily to raise funds and/or awareness about a specific issue, organization or cause.
- One-time, non-recurring events (project funding should be directed to the Grants Committee).
- Projects or activities that have been completed on or before the application deadline.
- Small neighborhood festivals and events by invitation-only.
- Commercial or entertainment ventures initiated by the private sector.
- Events that target a specific audience to the exclusion of the broader public (ie school events).

## 8. FUNDING LEVELS

Festival and event organizers can apply to one of three funding tiers. The amount of funding available to an organization is based on the applicant's ability to demonstrate that the festival or event meets all of the tier's eligibility requirements.

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Figure 1. Funding Levels

## TIER 1

**Funding Available:** Up to \$2,500

**Festival or Event Criteria:**

- Up to 10,000 in attendance.
- Marketed to and/or attracts primarily local residents.
- Minimum one day event with no less than 4 hours of programming.
- OR all first-time grant applicants.

Note: All first-time applicants must apply to Tier 1 regardless of where their event fits within the tiered system.

**Application Process:**

Festivals fitting within this tier are required to complete the Grants Application Form.

## TIER 2

**Funding Available:** \$2,501-\$5,000

**Festival or Event Criteria:**

- 10,000-20,000 in attendance.
- Marketed to and attracts primarily local and/or regional visitors.
- Minimum two day event, civic events being the exception.
- Minimum 12 hours of programming with no less than two hours/day.

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## **Application Process:**

Festivals and events fitting within this tier are required to complete the Grants Application Form in addition to the Supplemental Grant Application Form. In the Supplemental Grant Application form, applicants will be asked to demonstrate that the festival or event:

- Attracts 10,000-20,000 attendees and how this was measured.
- Produces a program that clearly meets two or more of the program's objectives stated in Item 2 in this policy.
- Has a marketing plan with, at minimum, a regional focus.
- Meets the minimum programming requirements.

## **TIER 3**

### **Funding Available: \$5,001+**

#### **Festival or Event Criteria:**

- 20,000+ in attendance.
- Marketed to and attracts tourists.
- Minimum two day event, civic events being the exception.
- Minimum 18 hours of programming with no less than four hours/day.
- Reports a minimum operating budget of \$30,000.

#### **Application Process:**

Festivals and events fitting within this tier are required to complete the Grants Application Form in addition to the Supplemental Grant Application Form. In the Supplemental Grant Application form, applicants must demonstrate that the festival or event:

- Attracts 20,000+ attendees and how this was measured.
- Produces a program that clearly meets three or more of the program's objectives stated in Item 2 in this policy.
- Has a marketing plan that clearly targets tourists.
- Meets the minimum budgetary and programming requirements.
- Has a proven track record delivering program objectives.
- Has a mechanism in place to evaluate the event's success (ie visitor surveys, Facebook/Twitter feeds).

Note: Attendance figures are to be based on the average number of visitors to the festival or event over the last three consecutive years.

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## 9. STAGES OF FUNDING

There are three sequential stages of funding provided through this policy.

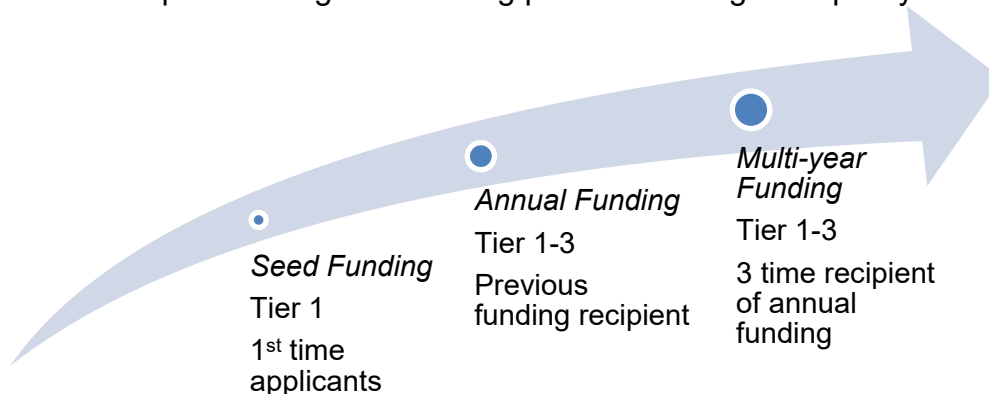


Figure 2. Stages of Funding

### Stage 1: *Seed Funding* - Funding for new or emerging events

Tier 1 is available to local festivals and events that are new or emerging within the City of Orillia. All first-time applicants must apply for seed funding regardless if the event fits within another tier.

### Stage 2: *Annual Funding* – Funding for recurring festivals and events

Established, local festivals and events within the community can apply to the City on an annual basis for operating funding. Applicants must have a proven track record of achievements, effective organizational structure, financial stability and general capacity to carry out the event with or without City funding. Applicants must have previously received funding from the City grant program or at the Departmental level to qualify. New applicants must apply for seed funding prior to moving to this next level of funding.

*Please note: This level of funding is not guaranteed on a yearly basis. Applicants must have accessed annual funding for a minimum of three years prior to being eligible to apply for multi-year funding.*

### Stage 3: *Multi-year funding* – Funding for a small number of longstanding festivals and events with proven track records and merit

Three-year operating funding may be available to well established, large-scale local festivals and events with a proven attendance of 5,000 or more. Applicants must have a proven track record of achievements over a minimum of **15 successive years**. These

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groups must be run by a registered charity or not-for-profit organization that has the financial stability and administrative capacity to carry out the event with or without City funding. Applicants must have previously received three years of annual funding from the City (Grants Committee or Departmental). While funding does not necessarily have to be consecutive, reasons for not receiving funding cannot be due to fiscal or board mismanagement.

*Please Note: Organizations that have previously received annual funding are not guaranteed multi-year funding; a separate application must be made to the Grants Committee under this policy.*

## 10. FILING INFORMATION

Applications must be submitted by October 15 to be eligible for funding within the next fiscal year.

Completed applications must be received by 4:00 p.m. on the deadline date, or be postmarked on or before that date. Late or incomplete applications will not be considered.

Festival representatives may be invited to do a short presentation as part of their application if they are a new applicant, a festival looking to move to the next tier, or following the appointment of new members to the Grants Committee.

Applicants are to mail or deliver one (1) complete copy of the Grant Application Form along with any supplemental information (if required) to:

**City of Orillia**  
**Partnership Program for Cultural Festivals and Events**  
**c/o Grants Committee**  
**50 Andrew Street South, Suite 300**  
**Orillia, ON L3V 7T5**

Applications will be evaluated on their own merit based on their ability to meet the funding criteria. Meeting all eligibility requirements of the program does not guarantee that an applicant will receive funding. Previous grant recipients are not guaranteed annual funding or renewal of multi-year funding.

All funding is subject to the availability of funds and the approval of the annual budget by Orillia City Council.

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Applications are available online at [www.orillia.ca](http://www.orillia.ca) or by contacting the Grants Committee by telephone: 705-329-7237 or the Manager of Culture by telephone: 705-325-4530.

## 11. IF YOU ARE AWARDED FUNDING

### Release of Funds

Organizations awarded funding will receive confirmation from the Grants Committee. Cheques shall be presented through the Mayor's Office with a member of the Grants Committee present, and all members of Council shall be advised of the presentation details in advance. Grants over \$5,000, along with all multi-year funding, will require a signed Memorandum of Understanding between the recipient organization and the City of Orillia outlining the terms and conditions of funding.

Funding results will be mailed to all applicants within six (6) months of the application deadline.

### Use of Funds

Funds shall be used only for the purposes outlined in the original application. Any significant changes to the festival or event's activities, including alterations in size, scope, budget, leadership, organizational structure and programming, must be reported to the Grants Committee. Changes that alter the intent of the original application may jeopardize future funding and require repayment of the grant as determined by the Grants Committee.

### Acknowledgement

Staff will work with grant recipients to determine suitable recognition for the City's level of investment. At minimum, acknowledgement should appear with other funding partners in or on:

- Print materials and social media feeds – By using the City of Orillia's logo or making a written acknowledgement.
- Verbal announcements – By mentioning support verbally in public announcements, presentations, press conferences and speeches.

An electronic version of the City logo can be obtained from the City's Manager of Communications: 705-325-8929.

### Insurance

If awarded funding, applicants must provide a certificate of insurance naming the Corporation of the City of Orillia as additional insured with a minimum of \$2,000,000 for comprehensive general liability per incident.



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## Reporting

Applicants receiving Tier 1 funding may be required to submit a follow-up report on how the funds were used and whether the project was successful, as per Item 10 of the Grant Committee's *Policy 4.2.1.1*.

All Tier 2 and 3 funding recipients must submit a follow-up report no later than 90 days following the completion of their event. Follow-up reports must include the following information:

### Project Summary:

- Overview of the festival's or event's primary activities.
- Objectives achieved, as specified in the application process.
- Major variances from original application and influencing factors (ie. weather).
- Any change in board structure since initial application.

### Statistics:

- Final attendance count and how this was measured.
- Number of volunteers and key volunteer positions.
- Summary statistics sheet.

### Budget:

- Final budget numbers with a breakdown of event revenue and expenses (Tier 3 recipients may be asked to supply audited financial statements).

### Media Exposure:

- Estimated media coverage (print, radio, TV).
- Website impressions, if available.
- Sample marketing materials with City logo.
- Representative photos or video documentation.

Failure to provide a follow-up report will result in an organization being *ineligible* for subsequent City of Orillia funding.

Please use the follow-up report form available on our website at [www.orillia.ca](http://www.orillia.ca). A copy of the form can also be obtained by contacting the Manager of Culture by telephone at 705-325-4530.

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## 12. APPLICATION CHECKLIST

The checklist below is a helpful tool for applicants to ensure they have included all the forms and information that are required in order to apply for funding.

- ✓ Grant Application Form.
- ✓ Supplemental Grant Information Form (if required).
- ✓ Financial statement from previous year.
- ✓ Festival budget, noting reasons for any surpluses or shortfalls.
- ✓ List of executive officers including names, titles, addresses and telephone numbers.
- ✓ Minutes from the last annual general meeting (if applicable).

## 13. BUDGET

The intent of this policy is to have funds specifically allocated for cultural festivals and events within the Grants Committee's general budget. If the full funds specific to Culture cannot be awarded due to an insufficient number of applications received by cultural organizations, it is at the discretion of the Manager of Culture or designate and the Grants Committee to allocate the remaining funds to other organizations applying for funding from the Grants Committee.

## 14. POLICY REVIEW

The policy will be reviewed on an annual basis for the first five years, at minimum, following its date of adoption.

(R. 2014-134 14.06.23)  
(R. 2018-159 18.08.16)