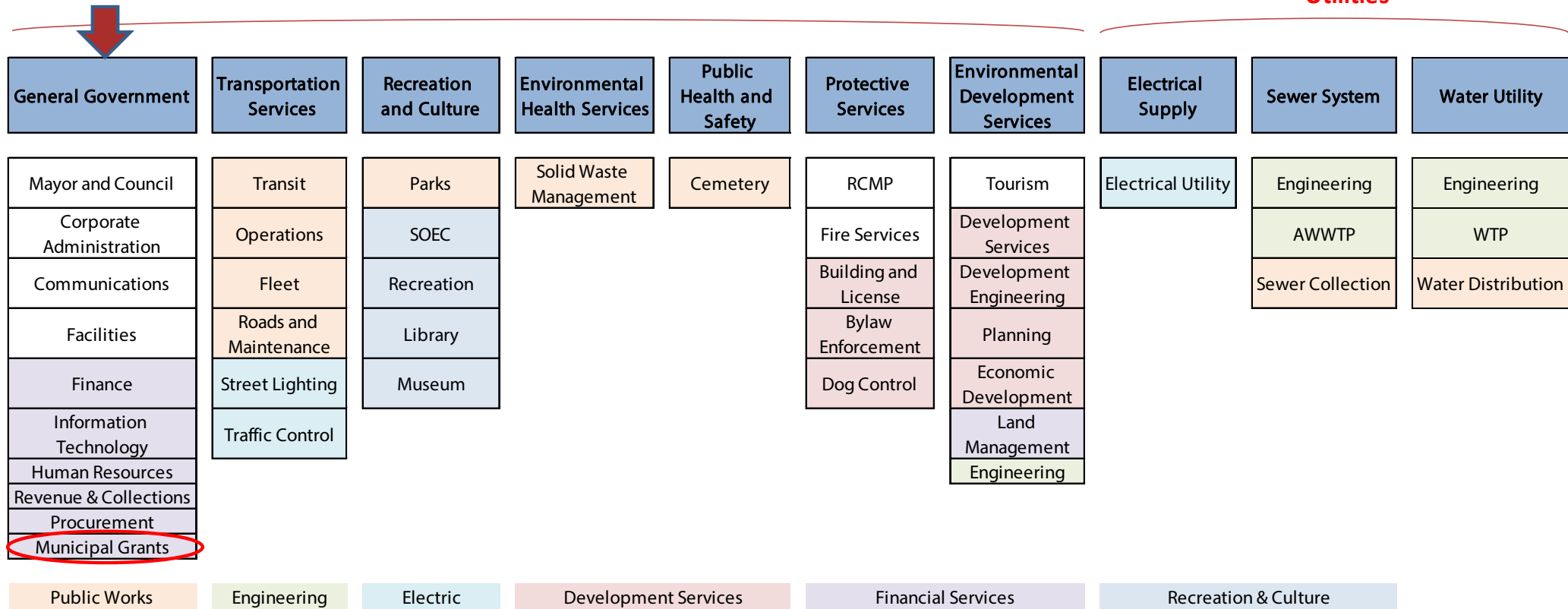


# City of Penticton: Financial Plan Reporting Structure

## General

## Utilities



# Policy Changes

- The grant policy was amended Aug 1, 2017 with the following policy changes:
  - Distinguish between seed and sustainable grants
  - Establish grant categories with specific outcomes
    - Arts, Culture & Heritage
    - Health, Safety & Social Services
    - Parks, Recreation & Sport
  - Identify grant applicants for visitor-oriented events and apply Eventful Penticton Criteria
  - Review all forms of assistance provided by the City and applicants efforts in seeking external funding during the application process



# Process Changes



The following process enhancements were implemented:

- Streamlined forms
- Enhanced grant analysis
- Creation of Scorecard



# Grants – Historic Demand

	2014	2015	2016	2017
Requests	\$751k	\$817k	\$932k	\$798k
Funded	\$669k	\$699k	\$667k	\$634k
% Approved	89%	85%	72%	79%



# Grants – Summary

Grant Requests	2018 Ask					2017 Budget	
	#	Cash	In Kind	Total	% of Grants	Granted	% of Grants
Arts, Culture, Heritage	19	302,912	68,300	371,212	57%	306,086	62%
Health, Safety, Social Services	15	156,160	21,148	177,308	28%	120,587	24%
Parks, Recreation, Sport	7	38,000	26,552	64,552	10%	47,831	10%
Other *	1	7,500	23,500	31,000	5%	19,734	4%
<b>Total Municipal Grants</b>	<b>42</b>	<b>521,622</b>	<b>130,700</b>	<b>644,072</b>		<b>494,238</b>	
Partnerships **	3	200,000	140,000	340,000		405,000	
<b>Total</b>	<b>45</b>	<b>\$ 721,622</b>	<b>\$ 270,700</b>	<b>\$ 984,072</b>		<b>\$ 899,238</b>	

\*Other opportunities and school reciprocal agreement

\*\* Partnerships include events such as Triathlons, Scotties, Granfondo, Western Canada Cup, etc.



# Grants – Arts, Culture & Heritage

Type of Grant	# of Years	NAME	Requested		
			Cash	In-Kind	Total
Sustainable	5	DPA - BC Family Day	1,100	-	1,100
Sustainable	5	DPA - Canada Day Celebration	4,500	-	4,500
Sustainable	5	DPA - Sunshine Cabaret - Summer Concert Series	8,000	2,300	10,300
Sustainable	5	Miss Penticton Royalty	10,000	1,500	11,500
Sustainable	5	Okanagan School of the Arts (Shatford Centre)	25,000	-	25,000
Sustainable	3	Okanagan Symphony Society	9,000	-	9,000
Sustainable	5	Okanagan Valley Music Festival Society - Penticton Kiwanis Music Festival	-	5,000	5,000
Sustainable	5	Pentastic Jazz Festival Society	8,000	7,000	15,000
Sustainable	5	Penticton & District Community Arts Council *	12,312	-	12,312
Seed	3	Penticton & District Community Arts Council - Arts Rising *	5,000	-	5,000
Sustainable	5	Penticton Art Gallery Society (City facility) **	125,000	-	125,000
Sustainable	5	Penticton Elvis Festival	-	6,000	6,000
Sustainable	5	Penticton Historic Automobile Society (Peach City Beach Cruise)	-	7,500	7,500
Sustainable	5	Penticton Peach Festival Society	20,000	24,000	44,000
Sustainable	5	Penticton Scottish Festival Society	-	5,500	5,500
Sustainable	5	Rotary Club of Penticton (Rib Fest)	10,000	6,500	16,500
Sustainable	5	Royal Canadian Legion - facility use, Remembrance Day *	-	3,000	3,000
Sustainable	5	SS Sicamous Society - operations (City facility) *	45,000	-	45,000
Sustainable	5	SS Sicamous Society - utilities (City facility) *	20,000	-	20,000
		Sub-total	302,912	68,300	371,212

\* Organization receives a permissive tax exemption

\*\* Organization has a permissive tax exemption and a non-market rent lease



# Grants – Health, Safety & Social Services

Type of Grant	# of Years	NAME	Requested		
			Cash	In-Kind	Total
Sustainable	5	Canadian Mental Health Association	2,500	-	2,500
Contract		CFSOS (establishment agreement)	25,000	-	25,000
Sustainable	5	Okanagan Motorcycle Riders Association - Toy Run	-	500	500
Sustainable	5	Okanagan Similkameen Healthy Living Fair Society	-	8,213	8,213
Seed	3	Penticton & Area Access Society	7,460	-	7,460
Sustainable	5	Penticton & District Search & Rescue (City facility)	-	12,435	12,435
Seed	1	Penticton & District Multicultural Society (SOICS)	15,700	-	15,700
Seed	1	Penticton Centre for Exceptional Learning	1,500	-	1,500
Seed	3	Salvation Army – Volunteer Coordinator *	25,000	-	25,000
Sustainable	5	Skaha Bluffs Park Watch Society	18,000	-	18,000
Sustainable	5	South Okanagan Seniors Wellness Society	18,000	-	18,000
Sustainable	1	South Ok Similk Mental Wellness Society - Penticton Branch (Mental Wellness Centre)	18,000	-	18,000
Seed	3	South Okanagan Similkameen Volunteer Centre Society	20,000	-	20,000
Seed	3	Young Life - South Okanagan	5,000	-	5,000
		Sub-total	156,160	21,148	177,308

\* Organization receives a permissive tax exemption

\*\* Organization has a permissive tax exemption and a non-market rent lease



# Grants – Parks, Recreation & Sport

Type of Grant	# of Years	NAME	Requested		
			Cash	In-Kind	Total
Seed	3	Canadian Sport School Hockey League	10,000	-	10,000
Sustainable	5	Okanagan Similkameen Conservation Alliance (Meadowlark Nature Festival)	5,000	-	5,000
Seed	1	Parkrun	3,000	-	3,000
Sustainable	3	Penticton & Area Cycling Association - bike to work week	5,000	-	5,000
Sustainable	5	Penticton Curling Club **	15,000	5,000	20,000
Sustainable	5	Penticton Dragon Boat Festival	-	12,752	12,752
Sustainable	5	Upper Dek Vees Hockey (via Penticton Recreation)	-	8,800	8,800
		Sub-total	38,000	26,552	64,552

\* Organization receives a permissive tax exemption

\*\* Organization has a permissive tax exemption and a non-market rent lease





# Grants - Other

			Requested		
Type of Grant	# of Years	NAME	Cash	In-Kind	Total
		Other opportunities	7,500	17,500	25,000
Contract		School District Rentals (joint use agreement)	-	6,000	6,000
		Sub-total	7,500	23,500	31,000



# Partnerships

			Requested		
Type of Grant	# of Years	NAME	Cash	In-Kind	Total
Partnership		Triathlon	-	110,000	110,000
Partnership		Granfondo	-	30,000	30,000
Partnership		Scotties	200,000	-	200,000
		Sub-total	200,000	140,000	340,000



# Questions

