



Civic Partner Operating Grant Program Q&A December 2024

Thank you to everyone who attended the Civic Partner Operating Grant Program (the Program) session on October 3rd and provided feedback on the draft application form and the Civic Partner Snapshot Profile template and who asked questions via Ask a Question on the Engage portal page. This Questions and Answers (Q&A) document has been compiled to address the questions raised before, during and after the session.

Sharing the Q&A reflects our commitment to transparency and collaboration and helps ensure that the perspectives and feedback from Civic Partners is collected. Feedback on the draft documents will be reviewed and considered when making revisions to the Program documents and continue to inform the Program's development.

Following direction from Council in Notice of Motion: Developing a New Civic Partnership Program (EC2022-1378), Administration developed a new Civic Partner Operating Grant Program to provide a structured, transparent, fair and consistent process to make operating grant funding recommendations to Council based on leading practices for grantmaking. We recognize that the Program is a significant shift and guided by your feedback, we are finalizing the Program implementation details for the Program launch on January 14th, 2025. We will keep Civic Partners informed about timelines and opportunities for questions and answers as the Program moves ahead, including additional information on the onboarding session on January 13, 2025. If you have questions at any time, please reach out to your Civic Partnership Consultant, or Kim Mustard, Manager, Major Partners.

Below is a page reference list to the key theme areas for the Q&A.

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Application and process

- 1. Q: Is this Application Form the same for all Civic Partner Program Streams (i.e. wholly-owned subsidiaries, legislated bodies and independent organizations)?**

A: While the application form will be the same for all Civic Partners, the broader discussion and review process will consider the uniqueness of each Civic Partner, including the Program Streams that recognize Partner structure.
- 2. Q: Is there going to be a question that asks the Civic Partners what they are doing for fundraising. Fundraising is a great source of funding, and some are more active in this than others. It might be helpful to ask questions like, “are Civic Partners fundraising”? If not, why aren't they fundraising? What have the outcomes been?**

A: Yes, we have included a question asking about how the organization uses fund development strategies to build capacity and address gaps in revenues in 2026.
- 3. Q: If we apply for the Operating Grant Program in January and we don't have our final audited financial statements until April/May, how is that taken into account?**

A: The Committee will be provided with information on historic financial health ratings as well as access to previous audited financial statements. Any information from the most recent audited statements that can be included in the process will also be brought to the Committee.
- 4. Q: When will the application package be available to review? Will Civic Partners be able to comment on a draft? What is the length and content of application? Is it possible to see a draft of the actual application form?**



A: The draft application form and Civic Partner Snapshot Profile template was shared with Civic Partners with a request for feedback. Feedback on the documents will be reviewed and considered when revising these documents.

5. Q: A number of the review criteria are objective but some are also subjective. I worry that those stories will be lost or maybe not land.

A: The application tries to find a balance between opportunities to talk about your organization's results and impact both qualitatively through performance measures, and qualitatively through storytelling.

6. Q: Can the difference between "Core Operating Costs" and "Program and Service Costs" be clearly defined?

A: As the stewards of limited public funding, the role of City Operating Grant Funding for Civic Partners is to address gaps that can't be covered by other sources to deliver agreed upon results for Calgarians. It can be used to fund both core operating expenses and direct program and service costs and the application collects information about these two areas to better understand how The City's funds support a Civic Partner's operations.

Core Operating Costs

Core operating funding is unrestricted funding used to cover any aspect of an organization's core operating costs that are not direct program costs. Core operating costs are required to have capacity to providing programs and services, and maintain good governance, employment, and financial management practices.

Examples of Core Operating may include:

- Research and evaluation
- Crisis and emergency response
- Governance
- Office spaces and supplies
- Marketing and communications
- Administration
- Finance and accounting
- Human resources including staff benefits
- Fund development
- Staff development
- IT
- Insurance
- Administration and reporting related to funding
- Program development and continuous improvement
- Strategic planning and other planning initiatives



Programs and Services Costs

Direct program and services costs are associated with delivering a program, service, or project, and may include a full cost recovery model that includes any associated core operation required to support direct delivery.

Examples of Programs and Services costs may include:

- Staff salaries related to the project or program
- Administration and supplies related to the project or program
- Marketing or communications related to the project or program

7. Q: How does the granting process compliment or coordinate with the Civic Partner Annual Report and Audit Template?

A: The Civic Partner Annual Report and Audit Template are accountability tools to understand the impact of The City's investments, and each Civic Partner's financial and organizational health. The Civic Partner Annual Report is usually in May and is an opportunity for Civic Partners with operating grants to report directly to a Committee of Council about the impact of The City's investment. The Civic Partner Audit Report annually presents the results of a financial analysis of Civic Partner audited financial statements and provides information about Civic Partner governance and risk management practices. Any discussion or presentation for risk ratings (risk for The City) is discussed in-camera. Civic Partners do not attend the Civic Partner Audit Report. Council has directed that reporting for the Civic Partner Operating Grant Program continue through these existing reports. The intention is that the Operating Grant Program application form should not duplicate information already provided to The City through existing reporting mechanisms, instead it should align with these existing accountability tools to help streamline the approach. If there is any overlap, it is on core principles that drive investment, and the application requires the connection between these key areas and the role of City funding.

8. Q: Forecasted figures and planned activities for 2026 will not be available (or will be very rough) by the March 7 application close date. Does this mean that the deadline for the annual report and audit report will also be accelerated?

A: Reporting timelines are driven the approved Council calendar which sets the 2025 Civic Partner Annual Report for May 22, 2025 and the Civic Partner Annual Audit Report on June 5, 2025.

9. Q: What are the "other tools"?

A: To leverage the information Civic Partners have already submitted to The City through accountability reporting, Civic Partner Snapshot Profiles (profiles), a summary of information developed for the Committee, will be created for each Civic Partner currently receiving operating funding and provided to the Committee to support understanding of Civic Partners' work.

The profiles include a summary of key information such as the Civic Partner's mission and/or vision, Council strategies supported, a Partner's own strategies, line of service, Partnership category, whether or not the Civic Partner is managing or operating a City-owned asset, performance



measures, links to previous annual and audit reports , and financial information including operating funding amount, percentage of operating revenue, amount of unrestricted reserves from prior year, financial risk rating), and operating funding history.

Following the October 3, 2024 session, the Civic Partner snapshot profile template was shared with a request for feedback from Civic Partners.

10. Q: How do you define and clarify the “financial risk profile”?

A: The annual financial review process as part of the Civic Partner Audit Report evaluates The City’s exposure to risk related to Civic Partners, assesses Civic Partners’ overall financial health and provides an opportunity to work with Partners to understand how they are managing risks that impact their financial health. The review process uses a tool with clearly established criteria and ratios to evaluate operating cash on hand, working capital/cash expenses, deficit level and reserves. Based on established criteria, each Civic Partner is assigned a rating of either low, elevated or high risk

11. Q: What is the rationale for not including character limits?

A: In the initial third party engagement with Civic Partners, Partners asked to not have character limits for questions.

12. Q: Could we now see a completed example of a successful grant application? A draft example of a grant application form would be a great reference.

A: Applications will be specific to each Civic Partner, so there is no example to share of what a successful grant application would be.

Snapshot Profiles

13. Q: Will the Partner Snapshot Profiles be completed exclusively by the City, or will this be required to be completed by the Civic Partner? Will we have a chance to review the partner snapshot before it goes to the Grant Review Committee?

A: The Civic Partner Snapshot Profiles will be completed by City Administration. Civic Partners will have the opportunity to review the completed snapshot profiles before they are finalized (not including the financial analysis page).

14. Q: Historically we have submitted six performance measures that we use, will all six be included in this section? There is currently only space for three measures.

A: Due to space limits only three will be presented but Civic Partners will continue to have the opportunity to include additional measures in the Civic Partner Annual Report.

15. Q: The snapshot appears complete, although you might consider noting the partner's fiscal year, especially if it does not align with the calendar year?

A: We have included the Civic Partner’s fiscal year on the snapshot profiles.



16. Q: What are the components of the audit report? Annual report (mentioned in Page 2 but not displayed)

A: These are links to previous [Civic Partner Annual Reports](#) and [Civic Partner Audit Reports](#).

Benefits of Partnering with the City

17. Q: Don't we all partner with The City to meet the needs of Calgarians?

A: This section in the application provides the opportunity for Civic Partners to describe the benefits of their partnership with The City as well as community or other needs that are met by the Civic Partner.

18. Q: Will partners have to explain the "Benefit to partnering with The City" every time?

A: Certain questions on the application will remain consistent over time as baseline questions. After the first round of implementation of the Program, Civic Partners will be able to leverage previous answers provided in the application form and build and/or change these as they see appropriate for future applications.

Meeting the Needs of Calgary and Calgarians

19. Q: Recommendation to stipulate if the response should be based on performance measures and whether the response should also be quantitative or qualitative. If there are connections to performance measures and the answer to this question, this should be noted in the response.

A: Qualitative and quantitative measures can both be included and this has been added to the description in the question.

20. Q: Can you define the phrase "quality of life" in terms of reference.

A: The following definition of "quality of life" has been included in the Glossary:

Quality of Life: The World Health Organization (WHO) defines quality of life as: an individual's perception of their position in life in the context of the culture and value systems in which they live and in relation to their goals, expectations, standards and concerns.

(<https://www.who.int/toolkits/whoqol>)

Results

21. Q: Recommendation to make it clear if this area requires quantitative measures only? Can you please clarify what is meant by qualitative measures?

A: Historically, some Civic Partners have asked to be able to present qualitative information to support their quantitative measures including stories that demonstrate impact, or brief case study information.

22. Q: What is the relationship between performance measures in the annual report vs. the operating grant application? Should they be the same?

A: The intent of the measures in the application is for Civic Partners to present the top three measures that will best demonstrate the impact of the City's investment. In the Civic Partner Annual



Report, there is additional space for Civic Partners to present additional supporting measures that they feel is meaningful.

Funding Request and Budget Submission

23. Q: Recommendation to elaborate that the operating budget for 2026 will be FORECASTED as none of the Civic Partners will have an approved budget for 2026 by the time they are filling out the application in Jan/Feb of 2025. Please consider budgets a year in advance may be subject to change and board approval after the submission to the review committee.

A: We have added "forecasted" to the budget template.

24. Q: The budget template should be designed to reflect the fact that the Partner's fiscal year may not align with the City's fiscal year.

A: A section has been included in the budget template to indicate the Partner's fiscal year.

25. Q: Where can we see the "full operating budget for 2026 in the table below"? Please provide a draft of the budget template.

A: We are sharing the draft budget template with Civic Partners in advance of the Program launch with a deadline for feedback. Feedback will be reviewed and considered when making revisions to the final template.

26. Q: Should there be a tab that outlines the number of FTEs covered by the funding?

A: There does not need to be an FTE (full-time equivalent) count included in the budget breakdown.

27. Q: What brought us to the position where 5% decrease in funding is being considered? Regarding 5% less for the budget seems arbitrary. The intent of this question needs to be more clearly articulated.

A: We do not expect any overall reductions to the total funding envelope, but as in every budget process, this is at the discretion of Council. The intent of this question is to gain a general understanding of the impact to a Civic Partner if a reduction is proposed.

Review Process

General

28. Q: What is the process of the Committee and funding recommendations? Who makes the decision(s) during each process step? How will the information be used by the grant review committee? On the calendar in mid March to June can you outline what is involved in administrations environmental scan/input from Calgarians and communities. How is this done, process, any third party use?

A: All applications submitted will undergo a fair and consistent review process. The application review process engages various groups within City Administration including the Major Partners team, the Administrative Grant Review Committee (review the Administrative Grant Review Committee Terms of Reference for more information), the Director of Partnerships, the General Manager of



Community Services, and the Executive Leadership Team (ELT). All funding recommendations will go to Council for consideration.

The application review process for the Committee to make funding recommendations for Council approval will be as follows:

Role of the Partnerships business unit

Program management & administration including:

- Intake applications
- Pre-screen and internally circulate applications
- Develop supporting materials
- Provide Committee support (administrative)
- Liaise with Committee throughout the internal Service Plans and Budgets process
- Develop supporting materials including information for Council as part of Service Plans and Budgets

As part of the preparation for Committee review, each application will be circulated to a broad range of internal subject matter experts within The City of Calgary to gather comments to support the Committee's review.

Role of the Committee

Develop recommendations for Council consideration by Council during the November budget process (further detailed in the full Administrative Grant Review Committee Terms of Reference) including:

- participate in an onboarding process,
- prepare for the Committee review process by reviewing all background information about Civic Partners and the Operating Grant Program,
- review applications in full,
- evaluate all applications individually and as a Committee based on an evaluation matrix and other tools including Civic Partner snapshot profiles
- receive Civic Partner presentations and ask questions,
- ask follow-up questions for Civic Partners if required through the Administrative Relationship Contacts, also known as the Civic Partnership Consultants, and
- come to consensus on funding recommendations and comments on each application,
- use The City of Calgary's Consensus Decision-Making Model if Committee consensus can't be reached
- support any questions from ELT or Council during the process and
- participate in an Operating Grant Program evaluation to support continuous improvement.

Civic Partner Committee Presentations: The Civic Partner presentations are an optional and are up to 10 minutes followed by up to 15 minutes of questions from the Committee. It will be up to the Civic Partner to determine who should present to the Committee. The presentations will be during the Committee review process, which are anticipated to be in April 2025.



Role of the Director, Partnerships

- Review funding recommendations from the Committee
- Bring forward the recommendations to the General Manager

Role of the General Manager, Community Services

- Review funding recommendations from the Committee
- Bring forward the recommendations to ELT

Role of the Executive Leadership Team (ELT)

- Full review of funding recommendations within context of all Service Plans and Budgets
- Ask questions or seek clarification from the Committee and Partnerships business unit
- If ELT requests further review of the recommendations, the Committee will reconvene and consider the comments from ELT and adjust funding recommendations if appropriate for ELT's secondary review.

Role of Council

- Consider funding recommendations for approval as part of Service Plans and Budgets

In 2025, due to scheduling related to the timing of the municipal election, the initial release of the funding recommendations to Civic Partners will occur during the Service Plans and Budgets release to Council and the public slated for mid-October 2025. An option to meet with the Major Partners team to discuss the recommendations and the Committee's consensus comments will also be offered to all Civic Partners at this stage. All 2025 release dates of the Service Plans and Budgets package will be confirmed in mid-2025.

All funding recommendations will be included in the final Service Plans and Budgets Adjustments package that will be deliberated on and approved by Council in November. Initial communication of final Council funding decisions will be confirmed verbally following budget approval (late November, early December), with a formal written confirmation by December 31, 2025.

Communication

29. Q: Between March to September, we shouldn't be initiating any conversations on our applications?

A: You can reach out to your Administrative Relationship Contact (i.e. Civic Partnership Consultant) at any time. Through the process, Civic Partners will have an opportunity to present to the Committee and engaged in a discussion including questions and answers.

30. Q: If questions are going to the Committee from ELT, how do you communicate with the Civic Partner?

A: We will reach out to Civic Partners if additional information or clarification is required but the intention is that all information is collected during the Committee review process.



City Subject Matter Experts

31. Q: What is an SME?

A: A Subject Matter Expert (SME) is a City employee with specific knowledge and background that can support the analysis and review of applications, and development of recommendations.

32. Q: How are subject matter experts found from within Administration?

A: As part of the preparation for Committee review, each application will be circulated to a broad range of internal subject matter experts within The City of Calgary to gather comments to support the review. The Partnerships business unit will seek out specific internal subject matter experts based on the subject matter expertise required.

Civic Partner Committee Presentations

33. Q: Presentation requirements (who should present, time of year, length).

A: As part of the Committee process, each Civic Partner will have an opportunity to provide a presentation for up to 10 min to the Committee following by questions. It is up to the Civic Partner to determine who should present to the Committee. Details about format of presentation and dates will be provided during the Program rollout. The presentations will be during the Committee review process and are anticipated to be in April 2025.

34. Q: Presentations to the Committee are limited to 3-5 minutes, which some find concerning. We don't know who the Committee members will be, and a longer presentation might be beneficial to provide context and history. There was no mention at how long the presentation will be for the admin committee. I have heard as short as 2 minutes. This would not be satisfactory to answer questions or present a plan for the future.

A: In response to the comments during the session about the length of the presentation, we have expanded the opportunity for the presentation timeframe to 10 minutes from 3-5 minutes to offer more context on Civic Partner's work. As part of the Committee's onboarding and preparation, they will have access to detailed information about each Civic Partner including a summary of their annual report and audit report submissions.

35. Q: Does the April presentation replace the May report?

A: No, there are two presentations. The presentation in April is part of the operating grant application process and will be to the Committee. The Civic Partner Annual Report in May is a public presentation to a Council of Committee (the Community Development Committee) as part of accountability for the prior year's grant.

Discussing Recommendations

36. Q: Is there a formal appeal process? A feedback loop is not an appeal process. There seems to be no way to disagree with or appeal the recommendations. This is concerning. Is there an opportunity to contest recommendation?

A: The intent of the process is to provide several key points of communication, including sharing the recommendations before the release to the public and Council. All budget processes include a



public hearing (November 18, 2025) and this is open to any member of the public. At this time, the Operating Grant Program has no formal appeal process.

37. Q: What is the difference between recommendations and what we are submitting? How do we mitigate the risk if the Committee creates a funding gap, and the Civic Partner disagrees?

A: To address impact of a gap between a Civic Partner's request and the final recommendation, we have included a question in the application to provide spaces for Civic Partners to identify the impact. We will build measures at the Committee level to mitigate this risk.

Administrative Grant Review Committee (the Committee)

Committee Composition

38. Q: Will the Committee members be listed publicly online?

A: No, Committee members will not be listed publicly online but the names will be shared with Civic Partners.

39. Q: Who is going to be on the Committee? How is this going to be structured? What does the Committee look like? Who will be on the review panel?

A: The structure of the Committee is outlined in the Administrative Grant Review Committee Terms of Reference including the skills and experience. There will be an internal recruitment process in Q4 2024 for Committee members and name of Committee members will be shared with Civic Partners once confirmed.

40. Q: Can you confirm that no Civic Partners will sit on the Committee?

A: The Committee is an Administrative Committee and membership only includes members of City Administration.

41. Q: Why aren't Civic Partners included on the Committee?

A: Based on the research and engagement phase of Program development, an Administrative Grant Review Committee was approved for the Operating Grant program.

42. Q: Are the individuals on the Committee the same for all Civic Partners, or does the composition of the Committee change from Civic Partner to Civic Partner?

A: There is only one Committee and members will not change during a review process.

43. Q: Do we get to see the Terms of Reference for the Committee before its finalized?

A: Yes, this was shared with Civic Partners before the session on October 3, 2025 so additional questions about the structure of the Committee could be answered.

44. Q: There is also concern regarding the makeup of the Administrative Grant Review Committee as the members have not been announced and the term of Committee members being only two years seems to be too brief to effectively onboard members and allow them to become experts on the application review process. Does the Committee change every four years? The two year

commitment seems short for the committee? Would you not want a longer window to cross multiple application years?

A: The term is two years. We will aim for longer term consistency. As there is movement in roles, there may be new members over a four-year period.

45. Q: Was a longer term for the Committee considered? Up to three years instead of two?

A: A two-year term was selected to ensure membership consistency for both 2025 grant process, and 2026 process for the recommendations for the next budget cycle (2027-2030). Committee members can serve up to three terms and this will support consistency over time.

[Committee Selection Process](#)

46. Q: Who is on the Committee, how are they being selected, how will they function with the volume of work required?

A: The structure of the Committee and recruitment of members is guided by the Administrative Grant Review Committee Terms of Reference. There will be a recruitment process in Q4 2024 for Committee members and name of Committee members will be shared with Civic Partners. Leaders of Committee members selected will be required to ensure that the Committee member has the time and capacity to participate in the Committee process. Administrative support will be provided through the Partnerships team.

47. Q: Who Administratively, will have the capacity to properly evaluate those Civic Partners in the Arts and Culture sector? Given the breadth of arts/culturally related Civic Partners and the fact the Arts & Culture division is focused on festivals, events, and public art, none of which are primary focuses for partner organizations (museums, performing arts, visual arts, heritage). I have concerns the grant administrative review committee will not understand the scope and work of all the partners. The partnership team knows the civic group, but how well will representatives from other city departments on the committee understand what we all do...let alone determine our future?

A: Civic Partner deliver a variety of services in specific areas that are unique, including economic development, heritage planning, cultural attractions, arts and culture and other areas. As a funding program, the focus is not on how a Partner undertakes its work, but instead what they deliver, the results achieved for Calgary and Calgarians and how this connects back to Council priorities, and broad city-building. Through this program The City is seeking to understand the role of City funding in Civic Partner operations given the organization's structure, earned revenue opportunities, and other factors. It is seeking investments that achieve results in alignment with City and Council priorities, including how they may shift over time.

48. Q: There was conversation regarding the capacity of an Administration Committee. How will the sheer volume of work be supported/facilitated, prior to making recommendations? How will people fit this into their regular positions? This will be time consuming.

A: While this is new program, it replaces the previous budget process that was managed by the Partnerships business unit that included similar steps of submission, reviews, and recommendations. For the Committee specifically, members selection will include assessment of their capacity to meet the commitments for this process and the Committee will have administrative support from the Partnerships business unit throughout the process.

49. Q: How will the recruitment process for the Committee happen? Will it be across all business units or certain ones? With respect to the Committee itself, will it be an open competition? And will the recruitment be across all City business units or just some?

A: Recommendations for Committee members will be sought from across The City through leadership and candidates must meet the criteria in the Committee skills and experience matrix.

50. Q: Are we sharing a skills and experience matrix for the Committee with Civic Partners? I am not necessarily looking for names, more for the skill set required and the experience profile.

A: This information is included in the Administrative Grant Review Committee Terms of Reference, which was shared with Civic Partners.

51. Q: How will recruitment ensure a wide range of skills, inclusion, and diversity? How will the Committee be recruited to ensure balance?

A: The recruitment process is aimed reaching out broadly across the corporation, and as noted in the Committee Terms of Reference, the recruitment process will seek a diverse pool of candidates including *knowledge of and experience with equity, diversity, and inclusion within the context of partnership and partner operations*.

Committee Review Process

52. Q: Documents say that recommendations will be accepted, what is the point in reviewing if it is just approved? Documents assumes a smooth path. What is the process is alternatives are needed?

A: The Operating Grant Program process compliments The City's Service Plans & Budgets process, including integrating recommendations into the full budget package that requires review by the Executive Leadership Team before it is presented to Council for approval.

53. Q: How will conflicts be resolved at the Committee level?

A: The process includes the Committee coming to consensus on comments to share back with an applicant about their application and the funding recommendation. As part of this process, a rating scale and other tools will be used to review applications consistently, and The City of Calgary's Consensus Decision-Making Model (see glossary) will be used in any cases where consensus can't be reached.

54. Q: How will conflicts of interest be managed?



A: We recognize that each member of the Committee may have unique conflicts, and there will be managed following leading practices already in place for The City's Boards, Committees and Commissions.

55. Q: What is the consensus model, why is a consensus model used, and what is the rationale?

A: The City's consensus model is used with the Boards, Commissions and Committees and aligns with the City's current practices. This Q&A will outline the decision-making steps and what happens if the Committee cannot reach a consensus.

Council

56. Q: When is the report to Council?

A: Recommendations will be included in Service Plans & Budgets packages that are currently scheduled to be released publicly in October to prepare for budget deliberations in mid- November. Firm release dates will be determined in mid-2025.

57. Q: Can Council make changes to recommendations before November? Doesn't this undermine the application process?

A: As part of the budget deliberations in November, it is within Council's authority to Council amend any recommendations in the Service Plans and Budgets..

58. Q: Will Council see the actual submissions? Will the Civic Partner annual report be included?

A: A purpose-built attachment will be prepared for Council and attached to the Service Plans and Budgets package. This attachment is still in development, and will include some details about the original request, including requested amount and other information *along with the Committee's recommendations*. The Annual Report is part of the public record of Council and all members of Council have access to the reports

59. Q: In a no lobbying period, there should be disclosure about funding request, and the difference in the funding recommendation, so that a Councilor could see it is different. Council needs to be aware of that change.

A: See the above answer for Question #58.

60. Q: Tricky to align with Council Priorities and may be tricky with new Council. I wonder about the lateness of the timing because these are about people and jobs. Is there is any way to better align with our budget cycles in the fall? Aligning with Council priorities may be tricky with a new Council coming in. With final budget decisions not communicated until potentially mid-January 2026, we are concerned this doesn't allow organizations to conduct their business planning cycles, which often occur in the summer and fall, and Board approvals of business plans and budgets which usually occur in November/December. How will The City provide clarity on civic partners' 2026 budgets to support business planning cycles that occur earlier in the year? Another concern is the timeline for release of the Funding Recommendation, and ensuring this is done with enough time for Civic Partners to complete their budgets for 2026. If there are delays in any phase of the

process, and the Funding Recommendation is being contested between the Civic Partner and Council, could this push final decisions into January 2026? Most Civic Partners have November deadlines for approving budgets with their boards, so this timeline for final approval appears to be too late in the year. The timeline for the application is overall a concern for the organization as it overlaps with City reporting deadlines and audit engagements for those following a calendar year. This is an added burden when the next cycle for 2027-2030 will follow the same timeline the year following.

A: Given the approval by Council through the budget process, and given the significant value of these investments, they will continue to align with the existing Service Plans and Budgets process with deliberations in late November. With the new Operating Grant Program, we have aimed to communicate recommendations to Civic Partners earlier than in the previous process to help support organizational planning. We would be verbally communicating approved grants as soon as the official meeting minutes are released, usually one week after budget deliberations (i.e. the first week of December) and letters being provided before the end of the year. While each year Council refines its priorities and over time there are consistent areas and themes that we can anticipate and can be updated included Program Guidelines as needed.

As part of the Municipal election process, onboarding is provided to new members and planning is underway to include information about this program in the orientation process.

Review criteria

61. Q: When will we see the review criteria the Committee will be using? What are the evaluation criteria to be used by the review panel? Will applicants have access to evaluation matrix? I would like to see more of the evaluation criteria though, and how the point system (if any) works. When will the rubric that is being used to assess funding applications be available to review by partners? What section of the grant application carries the most weight? ANY GRANT provides some information about how a grant is being assessed. A list of evaluation criteria, point systems, ranking system is a minimum to provide for this new approach. What is the rubric that is being used? I am interested in how submissions will be scored. Specifically, I would like more information on the rubric and how the City will apply objective measures to score each field.

A: In alignment with leading practices, we will share a high level summary of the criteria to be used, but not the specific evaluation tool. For 2026 funding, the focus is current state and not growth. The Program in 2025 will only apply to requests for Civic Partner Operating Grants. With the approval of the Civic Partner Community Safety Grant program (downtown focus), this will be integrated into the application for the 2027-2030 process.

In general, Civic Partner operating funding requests will be assessed in consideration of the following areas.

Funding request and the 2026 full operating budget

This area considers:

- the role of City funding in a Partner's operations.



- the potential impact of reduced funding.
- access to other sources of revenue.

Contributions and Alignment

This focuses on:

- contributions and alignment in current state with the Council Priorities and Focus Area that inform The City's investment decisions.
- considerations such as how a Civic Partner intends to address equity, diversity, inclusion, accessibility, anti-racism, Truth and Reconciliation and other approaches in its work.

Meeting the Needs of Calgary and Calgarians

This considers:

- the type and level of community or other needs an organization addresses for Calgary or Calgarians through its operations.
- how the need is understood and tracked as it changes over time.
- how an organization's operations meet the need.
- the larger landscape of organizations meeting the same needs and what unique role the organization plays in meeting the need.

Results

This includes:

- the results delivered for Calgarians, Calgary and other audiences that an organization tracks through performance measures.
- the benchmarks a Civic Partner uses to measure success and drive continuous improvement.
- how their performance is tracking against these benchmarks (recognizing that all organizations do not currently use benchmarks).

Benefits of Partnering with the City

This area considers:

- the partnership benefits for the Civic Partner, The City, and Calgarians.
- the link to quality of life for Calgarians.

Benefits of Partnering

This area considers:

- how many active partnerships a Civic Partners has in place.
- how a Civic Partner works with other partners or organizations to deliver its work.
- the benefits and/or collective impact a Civic Partner has achieved through the partnership.

Reduction Considerations

This includes:

- the impact of a reduction to the funding request be on the delivery of current levels of service.
- how significant the risks are created for the organization if funding is reduced.

As stated in the Civic Operating Grant Program Guidelines and Terms of Reference, it is the role of Council to consider the funding recommendations for approval as part of the full Service Plans and Budgets and approved amounts are subject to adjustment by Council at any time.

62. Q: Will the review criteria be set by the Committee or someone else?

A: The review criteria has been developed in consultation with a broad range of SMEs within Administration and based on feedback from the engagement process, research into leading practices, and practices within other City grant programs.

63. Q: Will the evaluation matrix be the same for all Civic Partners, or will it vary based on legislation?

A: While the evaluation matrix will be the same for all Civic Partners, the broader discussion and review process will consider the uniqueness of each Civic Partner, including the Streams that recognize Partner structure.

64. Q: What are the benchmarks and peers for review criteria? Are they local or national comparisons?

A: Each Civic Partner would define the most appropriate benchmarks for their work.

65. Q: Council focus areas change often. The point of an unelected administration is (among other things) to provide some stability less affected by the swings of elections. Could we instead of council priority have a list of more long term city priorities? With a new Council approving the 2026 budget, these Council Priorities and Focus Areas may not be the same. How can we align our work to the new Council priorities? Will the evolving corporate service plans/budgets, council priorities be shared with the partners in advance?

A: No, investments are approved by Council and their priorities drive investment decisions. We will share them as soon as they are confirmed and released by Council for the next budget cycle.

Here are a couple of questions and answers from the May 27th Q&A:

How can Civic Partners be expected to change their focus every four years to align with each Council's priorities?

Civic Partners are focused on delivering their mandates and missions, which do not change with a budget cycle. It is not expected that Civic Partners shift their focus, but like current processes, funding requests need to demonstrate alignment with Council's priorities. As noted in the previous question, Council's priorities are usually very broad.

If Council's objectives/policies/strategic vision change from one Council cycle to another, how will this impact this process and our partnership agreements?

Similar to the current process, Civic Partners will need to demonstrate alignment with Council's priorities. Council's priorities are usually very broad for example "Economic, Social and Climate Resilience". During a specific cycle, Council may further refine these priorities, for example defining a

focused priority on Downtown Revitalization. Civic Partners may not and are not expected to align with all with the refined priority areas. Depending on the cycle, Council may use the refined focus areas to make targeted investments.

66. Q: Will “Social Resilience”, “Economic resilience”, and “Climate Resilience” be defined in terms of reference for when completing the grant application?

A: A definition and information can be found on these Council Foundations can be found at the City web site at <https://www.calgary.ca/council/resilient-calgary.html>

No lobbying requirement

67. Q: What about talking to Councillors? What's the process for lobbying? When will there be more information to define and clarify the no lobbying requirement?

A: Please refer to the “Overview of *No Lobbying Requirement*” sheet for more information.

68. Q: What does it mean to inform the Councillor if we can’t lobby?

A: Clarification is provided in the distinction between informing and lobbying in the Glossary as well as in the “Overview of *No Lobbying Requirement*” sheet.

69. Q: If we apply for our Civic Partner Program Grant in Q1 - and Council doesn't approve until November (which is basically the whole year) - how does the no lobbying/interactions with Council work during such a long period of time? Especially when all the Councillor conversations are generally about money or new opportunities that cost money.

A: Please refer to the ‘Overview of *No Lobbying Requirement*’ sheet for more information. The requirement for no lobbying is specific to a funding request that has been submitted to the Operating Grant Program. Any opportunities provided for new investments in a budget cycle would also be managed through the program.

70. Q: Are the Councillors being informed about the no lobbying rules?

A: Yes. Partnerships has provided regular updates to Council about this program and will continue to support them during the rollout and implementation process. Council engagement results in Phase 1 informed the development of the Terms of Reference for the Program which includes the no lobbying requirement. This clause was approved by Council as part of the Terms of Reference.

71. Q: How can Civic Partners ensure that our stories are told during the no lobbying period? How can we ensuring Councillors have the right information on Civic Partners and understand the value each Civic Partner brings and why they are being funded? It is about making the case that this should be a priority. That is the work of lobbying and advocating. It does feel sometimes that administration has a hard time making that case for us.

A: The Operating Grant Program provides a structured, transparent, and consistent approach to develop multi-year Civic Partner operating funding recommendations for Council approval. The Partnerships business unit is working alongside our colleagues that support the Service Plans and



Budgets Process to ensure that Councillors have the right information about the funding recommendations from the Committee and understand the value that Civic Partners bring.

While a funding request is under review in the Program, Civic Partners can still:

- ✓ meet with Councillors and their staff to develop solutions, explore issues, or talk about their programs and services;
- ✓ meet with members of Administration to advance current work and develop new approaches;
- ✓ engage in policy discussion with Councillors and Administration;
- ✓ invite members of Council and Administration to events and initiatives;
- ✓ undertake any meeting required during the regular course of business; and
- ✓ confirm they have submitted their operating funding requests through the Program.

72. Q: What happens if Council disagrees with the Committee's recommendations? Why can't we discuss our recommendations with Council?

A: Council approves all City Service Plans and Budgets including operating grant recommendations. Council has the authority to amend any recommendation in Service Plans and Budgets during budget deliberations in late November.

73. Q: Can we supply information before the process opens, given our future plans?

A: The requirement for no lobbying is specific to a funding request by organizations or individuals representing the organization from the date of submission of an application to the Operating Grant Program until the approval of funding recommendations by Council.

74. Q: If we lobby what are the consequences? What is the perception of someone lobbying?

A: The focus of the Program is on education and support for Administration, Partners and Council to align with the no lobbying requirements. If an instance of lobbying is identified, the first step would be a conversation with the parties.

75. Q: Election season has started, to me the challenge we had in the last round is that envelope that you got was limited so it is impossible for us to grow. Value isn't recognized. Case making is to show our investments vs. internal City needs?

A: As directed by Council, the first grant program process will focus on adjusting 2026 approved base operating grant amounts. The focus of the first process will be to work within the existing envelope. Discussions about the potential envelope for the 2027-2030 grant process will begin in Administration in Q1 and Q2 2026.

Impacts to future funding

76. Q: This was more a comment about what they're hoping for outcomes. They are not looking for additional funding to grow the organization, but don't want to be reduced through cuts or inflation.

A: The City's budget process is always mindful of the impact of inflation, population growth and other cost pressures and the Program is assessing how to build in these considerations. However,



with Council approved funding, there is always the possibility of reductions due to limited funding available during a cycle, or Council decisions during budget adjustments.

77. Q: Will there be an area to justify the difference between maintaining the status quo and potential growth? Will growth be dealt with differently?

A: The intent of this program is to clearly understand the right level of City funding that is appropriate for each Partner's operations. For 2026 funding, the focus is current state and not growth.

78. Q: Is one-time funding only one-time? Could we receive additional one-time funding again in another budget cycle?

A: One-time funding approved by Council for 2026 is out of the scope of the Program and will not be adjusted for 2026. The Program is only managing base operating grant funding amounts approved for 2026. One time funding approved from 2023-2026 is only approved for those years and was not approved as ongoing base funding. Any request for additional ongoing, base operating funding to address gaps left once the one time funding has ended in 2026 would need to be submitted in your application.

79. Q: Does this process apply to base funding or one-time funding? Does the process apply only to base grant or one time as well?

A: The 2025 grant program will only seek to adjust 2026 approved base funding amounts, not any one-time grant funding approved by Council as part of the Motion Arising in 2022.

80. Q: Are we penalized for including one-time funding in the application?

A: The focus of the 2025 grant program is base funding and will not look to adjusting the limited number of partners that had targeted one time funding approved in 2022. Looking ahead, we anticipate that some Partners requests for the next budget cycle (2027-2030) may include portions of approved one time from 2023-2026 that they see as critical to move into base operating grant funding.

81. Q: Will this impact the funding we will receive in 2025 and 2026 as we received a funding commitment letter from the City for those years? Is our designated funding amount for 2026 no longer guaranteed?

A: As directed by Council, the Civic Partner Operating Grant Program will be developing adjusted funding recommendations for 2026 for Council consideration. All Civic Partner funding letters issued during a budget cycle, including 2023, include a note that funding is subject to Council approval as Council has the authority to amend decisions at any time.

82. Q: Should we envision scenarios where we are fully funded, partially funded, not funded?

A: The application includes the opportunity to speak to the impact of not receiving the full amount of a request and this will inform the Committee's recommendations. The intent of this program is to clearly understand the right level of City funding that is appropriate for each Partner's operations.

83. Q: Is this for the 2026 budget? Will this take effect for 2026 funding and reset for the next four years? Should applications be tailored accordingly? Are we reapplying for the 2026 budget?

A: The first round of the program to be launched in Q1 2025 will seek applications to adjust 2026 base operating grants.

84. Q: The City funding is one of the most predictable source of revenue for their organization. There are concerns about a rapid change to funding. Will there only be a change to a certain percentage each year (e.g. reductions, increases a large one year cut)? What would be the hesitancy in specifying the amount of funding that could change in a given year? With regards to the point of transitions to different levels of funding, what is the hesitancy about putting into limits to changes in amounts?

A: The intent of this program is to clearly understand the right level of City funding that is appropriate for each Partner's operations. As part of the Program development, there are discussions about how any larger changes to a Civic Partner operating grant would be managed. In the spirit of our long standing partnerships with Civic Partners, we would aim to undertake any significant changes through a transition period in collaboration with the partner to ensure the partner's financial health and stability is not impacted.

85. Q: Given there are Civic Partners with long standing, regular budgets, what are the chances this will change any of that?

A: All Civic Partner operating grant funding amounts are included in this process and applications will be reviewed using a consistent approach and established review criteria.

86. Q: Will Civic Partners continue to receive their full operating grant investments, even when they are doing well? Or with a limited pool of operating grant money, will The City look to cut back operating funding for Civic Partners who are doing well financially?

A: Operating funding recommendations for Civic Partners will be developed by the Committee members who will leverage their knowledge and expertise to apply established review criteria to make these recommendations. The application package for the Committee review process will include financial analysis information based on previous annual reports and audit reports provided by the Civic Partner. The process will also consider the role City funding plays in each Civic Partner operations.

87. Q: You mentioned that you know the envelope?

A: Given changes within a cycle, the intention and direction from Administration is to manage the adjusted 2026 operating grant recommendations within the existing envelope. The total amount of funding that will be available through the first round of the Civic Partner Operating Grant Program in 2025 (for 2026 grant funding) is anticipated to be the total amount for all eligible Civic Partners in the Program that was approved for 2026 as part of the 2023-2026 Service Plans and Budgets. The Program may result in recommendations to shift the current Civic Partner allocations within the overall total approved amount.



- 88. Q: Doing this annually is a very heavy burden to smaller civic partners where the ED is also delivering front line service. Larger Civic Partners have fund development folks that can fill these out very quickly. Not sure how this 'one size fits all' approach will provide equity in grant making.**
A: The current cycles are driven by Council direction, but the intent is once we start the 2027-2030 grant cycle we would only run the program if required (i.e. Council investments or reductions within a cycle).

Implementation Timelines

- 89. Q: What are the key timelines for the Civic Partner Program in 2025 (e.g. milestones, timelines, deadlines, implementation)**

A: The key timelines for the Program rollout in 2025 are as follows (NOTE: All dates are subject to change):

- January 13: Onboarding Session for Civic Partners
- January 14: Application Open
- End January: Drop-in Q&A Session #1
- Mid-February: Drop-in Q&A Session #2
- End-February: Application Reminder
- March 7: Application Close
- April: Civic Partner Committee Presentations and follow-up questions from the Committee to Civic Partners through their Administrative Relationship Contact
- Mid-October: Release and Discussions of Funding Recommendations to Council through the Service Plans and Budgets adjustment documents (release of funding recommendations to the Public as part of the Service Plans and Budgets package including Civic Partners)
- November 24-28: Council deliberations of funding recommendations as part of Service Plans and Budgets adjustments
- November 28: Last day of Council deliberations. Approval of the Service Plans and Budgets by end of day. Communication of Council approved funding to Civic Partners. Funding recommendations for all Civic Partners is available.

- 90. Q: Under review from March 7 - Council in November?**

A: Yes, the funding process is estimated to extend from submission of an application in March 2025 to Council approval in November 2025.

- 91. Q: Will the timeline change in 2026? Do you have timelines for 2026 Program rollout?**

A: The timeline for the application for the 2027-2030 budget cycle is planned for rollout in Q1 2026. Given that it will be planning for a new budget cycle, there may be some minor adjustments to the timing and process.

General Questions

- 92. Q: Will the definition of Civic Partner be revised or clarified? Moving forward, what will be the clear definition of a Civic Partner other than the level of funding? Some definitions to provide context and clarity behind some of the vocabulary used (Financial risk rating, social resilience...)**



and a clear definition of what a civic partner is (not just based on the level of financing) and the main criteria for an organization to be a and remain a so called Civic Partner. Based on the partnership policy, there are 2 types of Civic partners among the 7 different types of partners. It would help to clarify the set criteria used to define A Civic partner (other than their level of funding) since civic partners, community partners have been involved in this process although civic partners who did not receive funding recently have been excluded...

A: "Civic Partner" is a term defined in the Council *Investing in Partnership Policy*.

Eligible organizations for the Operating Grant Program are only those Civic Partners with base funding approved by Council are eligible for this program. Eligibility is further defined as follows in the Program Guidelines:

Only City of Calgary Civic Partners, as defined in the Investing in Partnerships Policy, that receive operating funding in the year the Operating Grant Program is accepting applications, and are in good standing with The City (e.g. following the terms of their agreement, providing all the required items, having paid any amounts owed to The City for services or taxes, no breaches or defaults), are eligible for the Operating Grant Program.

As required for all City policies, the Investing in Partnerships Policy is currently being reviewed and it is anticipated that an updated policy will go to Council in mid-2025. The policy amendment will address a number of housekeeping changes, and other updates are also being explored. The project is led by the Major Partners team, and internal and external engagement will be included as part of the process.

93. Q: What's your elevator pitch on how this new Civic Partner Program is changing or what is different from the old model?

A: "The Operating Grant Program provides a structured, transparent, and consistent approach to develop multi-year Civic Partner operating funding recommendations for Council approval." (taken from the Civic Partner Operating Grant Program Guidelines)

94. Q: Will the Civic Partner Program/Terms of Reference, etc. go to Council for approval?

A: The Civic Partner Operating Grant Program Terms of Reference were approved by Council in November 2023.

95. Q: With operating agreement, does that mean there may be two agreements?

A: Each Civic Partner has different agreements in place, and we will consider if we can work with an existing agreement that has a longer term, or if this is an opportunity to work with the Partners on an updated agreement.

96. Q: What will the program fund and not fund, especially regarding costs outside Calgary?

A: Currently, this is what is included in the Program Guidelines:

Ineligible Costs

The following types of expenses are not eligible for funding under this Operating Grant Program unless specifically approved in advance in writing by The City of Calgary:

- *increases to reserves (operating, capital or other),*
- *costs which are capitalized on an organization's balance sheet,*
- *capital maintenance,*
- *debt or cost of debt,*
- *expenses for projects or initiatives that are eligible for capital funding under the Civic Partner Infrastructure Grant Program (CPIG),*
- *costs that support the delivery of programs or services outside of Calgary and,*
- *costs that are claimed from other third parties or grants,*
- *costs that are normally recovered through a fee and,*
- *non-cash expenditures, such as depreciation.*

With the statement “unless specifically approved in advance in writing by The City of Calgary” this provides the opportunity for Civic Partners to indicate costs such as those outside Calgary for discussion and consideration.

97. Q: Will our reporting requirements change?

A: Council has directed that reporting remain the same but we aim to engage in continuous improvement and would update reporting tools over time as needed based on feedback from Council, leadership and Civic Partners.

98. Q: Is this happening anywhere else in the City?

A: Given the unique nature of Civic Partner operations, and significant level of the investments, this is a purpose- build program. It is built on leading practices for other programs within The City, and within the broader grantmaking sector. The program has been developed in close consultation with colleagues that manage other City grant programs but recognizes the uniqueness of these particular investments.