



CIVIC PARTNER OPERATING GRANT

January 29, 2024 Engagement Session

What We Heard Report

March 11, 2024

Table of Contents

What We Heard- Executive Summary	2
Project Background.....	3
Engagement Overview	4
Audience and Methodology	4
Objectives	4
Timeline	5
What We Asked	5
What We Heard in Detail.....	6
Part 1: Guidelines.....	6
Part 2: Review Processes, Streams and Evaluation	7
Part 3: Application Process	12
Part 4: Reporting.....	16
Part 5: Transparency.....	22
Part 6: Unresolved questions and sensitivities.....	25
Part 7: Session Evaluation.....	26

Table of Figures

Figure 1- Word cloud: What criteria is missing?	10
---	----

What We Heard- Executive Summary

On Jan. 29, 2024, The City hosted an in-person engagement session with representatives from all Civic Partners. In total, 35 representatives participated. The goal of the session was to explore key areas of the Operating Grant Program to inform The City of Calgary's Major Partners team decision making. These key areas of the Program included guidelines, review processes, streams, evaluation criteria, the application process, reporting, transparency, and evaluation of the session itself.

The following summarizes the key themes that participants shared during the session and some key observations from the table facilitators.

Key take aways from engagement

Participants shared an authentic appreciation for an opportunity to be involved in the development process and to provide feedback. However, some participants shared that while they asked for more clarity and transparency in the funding process, they felt uncomfortable providing feedback that could possibly disadvantage them later.

Another common theme heard by most participants was the challenge to provide feedback in the absence of more details and information about each specific area or example content that was provided to them.

The first section of the workshop focused on the Program guidelines. Participants felt that some guidelines were not necessary, like geographical area for example and others shared a few additions they would like to see added, such as criteria specific to each stream. As this was the first opportunity for participants to share their concerns and questions about the Program and the process, much of the feedback gathered are just questions and areas Partners would like more clarity.

The majority of participants agreed that the most important evaluation criteria for funding decisions are the benefits and expected impact Partners provide to Calgarians. Other evaluation criteria mentioned often included if an organization leverages other funding sources and past performance. Many participants appeared to be unaware that the Partner legal structure is already outlined in the Terms of Reference. Other suggestions for how organizations could be grouped included size or capacity of organization, type of service/sector and the amount of funding provided by The City.

When it comes to the application, participants are looking for a user-friendly approach that reduces duplication. Participants suggested pre-populated content that The City already has and creating more flexible ways for Partners to apply, such as video submission. Others shared that The City should only ask what they need.

Communication and transparency were key themes that reoccurred throughout the session. Partners want The City to share why information is being collected, what it will be used for and who will see it. Similarly, they would like their application to be shared in full to Council, without editing or summarization. This theme continued through the topic of the Grant Review Committee, with a desire to be able to communicate and present directly with the committee and know who sits on the committee.

On the topic of reporting, participants shared a concern about the level in which they are expected to align with Council priorities, with some saying that Council priorities change often, and it was a challenge to keep up. Similarly, some mentioned the expectation to align with climate action and Truth and Reconciliation, with some stating that these are not part of the Partners mandate. Most partners shared that they are looking for more opportunities to tell their impact story and these opportunities are not currently included in the RBA template.

Partners made it clear that they have more questions than answers and still grapple with unresolved issues, such as the no lobbying clause and the Grant review committee that are outlined in the terms of Reference.

Participants ended the session with suggestions for more in-person sessions to continue developing the Program, perhaps focusing on each topic individually.

Project Background

In December 2022, Council adopted a Notice of Motion (EC2022-1378: Developing a Civic Partnership Program) that directed Administration to undertake a Civic Partner Operating Grant Program that aligns with current and future Council directions.

This Notice of Motion was in response to several challenges with the existing funding model that were confirmed during engagement conducted by a third-party consultant. Generally, the consultant's engagement process brought to light challenges related to the current approach including:

1. Lack of transparency, feedback channels and flexibility.
2. Program would not recognize the complexity of partners.
3. Program creates a competitive funding environment.
4. Perceived lack of accountability including financial accountability.
5. Incongruence with larger corporate budget processes.
6. Funding decisions that are impacted by political influence.
7. A lack of rigor in funding allocations.
8. Challenges related to equitable distribution of funding.

In October 2023, Civic Partners had an opportunity to provide feedback and ask questions about the draft Terms of Reference. During this time, key concerns that emerged included the no lobbying clause, the future level of Council oversight and their continued participation as Board members and the grant review committee. Additionally, participants shared concerns about the grant Program's potential lack of transparency and understanding of the complexity of Civic Partner's work. Finally, "equitable distribution of funding" raised many questions.

These Terms of Reference (ToR) were approved by Council on Nov. 28, 2023. This ToR is the foundational approach for the Program and is guided by The City's baseline processes for grant programs and required alignment with the Service Plans and Budgets process.

The Major Partner's team will be required to use the approved terms of reference to adjust the allocation of grant funding to Civic Partners for 2026. They will also be required to annually report back to Council on the program via existing Accountability Reports and Civic Partner annual reports.

This next phase of engagement with Civic Partners is intended to inform the development of the Grant Program details and processes.

Engagement Overview

Audience and Methodology

The audience for this engagement process was very targeted and included representatives of all Civic partner organizations and Civic Partnership relationship contacts.

The in-person session was designed to provide time and space to get the Partners thinking and talking about the key areas of the Program. To ensure all topics were covered in the session, we took the approach of table facilitators hosting conversation "sprints" with a small number of participants and a note taker recording the feedback. Participants were given different ways of sharing feedback, including having the note taker record comments, adding anonymous feedback to posters on the wall and adding ideas to Menti Meter questions.

An [online portal page](#) was created to provide an opportunity to participate for those who were unable to attend the in-person session and for participants to share additional thoughts after the session. The content and questions on the portal page duplicated what was shared in the workshop.

Objectives

The overall intent of this engagement was to gather input into the Program through meaningful and effective engagement. Civic Partner involvement will help The City to develop and maintain positive relationships with these important partners and ensure the services they provide to Calgarians continue.

Objectives for engaging with Civic Partners include:

1. To inform participants of the required information needed for them to provide meaningful feedback.
2. To provide opportunities for participants to share their concerns and ask questions.
3. To understand what information Civic Partners would expect to be included in the Program Guidelines.
4. To explore what makes an application process easy and user friendly.
5. To explore evaluation criteria on which funding decisions will be based. This includes criteria common to all applicants and for any other additional ways Partners think applications could be organized.
6. To understand what Partners believe is the most important information to report to Council to demonstrate the impact of The City's investment.
7. To understand what processes and components Civic Partners feel will contribute to transparency, positive relationship building and effective communication between The City and Civic Partners.

8. To inform participants about the timeline and next steps of the Program development and to co-create future opportunities to be engaged.

Timeline

Timeline	Milestone
December 2022	Notice of Motion EC2022-1378: Developing a Civic Partnership Program
Nov. 28, 2023	Council approves the Terms of Reference for the Civic Partner Operating Grant Program.
Jan. 29, 2024	In- person workshop #1 Gather feedback to inform application, review processes and reporting.
Jan. 29-Feb. 11, 2024	Portal page remains open for an additional 2 weeks for follow up comments.
Feb. 11, 2024	Portal page closes.
March 2024	What We Heard Report published and shared with Partners.
Q2	Draft Program development and additional engagement opportunities.
Q3	Brief provided to Community Development Committee.

What We Asked

Questions in this engagement process explored six key areas.

- Part 1: Guidelines
- Part 2: Review Processes, streams and evaluation
- Part 3: Application Process
- Part 4: Reporting
- Part 5: Transparency
- Part 6: Evaluation

What We Heard in Detail

Part 1: Guidelines

Guideline examples

Question 1: Anything you think shouldn't be on the list?

Participants had plenty to say on this topic. There was a general feeling that redundancies could be removed or simplified, like with funding usage restrictions, as well as some unclear directions that could either be removed or updated, like with geographic requirements. One item that was brought up by many Civic Partners was Administration's "inflexible" timelines, which while understandably can't be removed, participants felt that they were too inflexible and could use more input from all impacted parties.

Theme	Details
Geographic requirements	Geographic requirements are redundant or lacking in clarity. Remove or clarify.
Role clarity	Particularly with Council priorities, Administration requirements and Civic Partners supporting City services and infrastructure.
Funding usage restrictions	Seen as unhelpful when supporting diverse Civic Partners. This should be simplified for the operators and made more transparent from The City.
Update and clarity on reporting	Reporting is seen as rigid, repetitive and potentially expensive for Civic Partners. Common auditors being required was a spot of contention, as was how reporting is being used and by whom.
Inflexible timelines	Inflexible timelines: Review period, grant request drafting, reporting and Civic Partner fiscal calendars would benefit from more flexible timelines.
Non-universal terms	Terms like "program" were felt to be a top-down look to compartmentalize Civic Partners services, rather than indicative of how funding is actually being used.
Liked all guidelines	Some Civic Partners were in favour of all guidelines and felt they all had merit, though some clarity and fine detail was requested.
Unsure of what to remove	Simply unsure of what could be removed while still providing useful and functional guidelines.

Question 2: Any additional sections you think should be added?

When given the opportunity to expound on additional sections which could prove most helpful, the Civic Partners gravitated strongly to additions they felt would help them be successful in their funding applications. Being provided with clear and detailed eligibility criteria and examples was a common theme, as was criteria specific to each stream rather than a blanket or one-size-fits-all approach.

Theme	Details
Eligibility criteria details and examples	More of an adjustment to what is already requested in the application, from high-level to fine details with examples.
Financial and timeline clarity and flexibility	Participants were interested in the application considering how funding is spent, when it's spent and Civic Partner specific needs regarding both timelines and funds.
Stream specifics and criteria	Stream specifics will need to be clearly identified and outlined for Civic Partners to be successful in funding applications.
Ongoing input and communication	The option to have continuous contact with Administration throughout the funding process.
Co-application opportunities with other partners	The possibility for partners to apply for grants when their services and or programs line up.
Council direction specifics	If and when Council adjusts direction, Civic Partners would like to have this information up front.

Part 2: Review Processes, Streams and Evaluation

Criteria examples

Question 1: What are the most important criteria you think Civic Partner funding requests should be evaluated against?

The criteria identified the most as being important is “benefit to Calgarians/expected impact.” Other criteria selected as being important were “demonstrated community need,” “alignment with Council priorities,” alignment with City strategies and plans,” “financial health” and “organizational capacity.”

Question 2: Why are they most important?

The reasons given for “benefit to Calgarians/expected impact” being important were that it's the purpose of Civic Partners and their mandates are to serve Calgarians. Rather than explaining why the other criteria are important, participants had questions and comments about each. Overall, there were questions about how criteria are defined, measured and evaluated. There were also comments about needing more detailed information about each criterion before being able to provide valuable feedback. Mainly there was uncertainty about how this process will affect funding decisions and they don't want to be penalized for “getting it wrong” because this will be new to everyone.

Evaluation criteria	Questions and comments
Organizational structure	Does this mean legal structure?
Alignment with City strategies and plans	What about when City strategies and plans change? Problematic when Civic Partners provide services for longer than 4-year terms Shouldn't be about alignment, should be about providing unique services The City can't/doesn't provide
Alignment with Council priorities	Aren't City and Council priorities the same thing? Can't predict Council priorities and don't they change when issues emerge? Council priorities might not be aligned to community benefit, which is the priority of Civic Partners. Shouldn't be part of the criteria because Council changes every 4 years, which changes priorities. Civic Partners need to update their strategies to align with Council priorities or risk being misaligned. Alignment with City priorities should be more important than alignment with Council priorities.
Benefit to Calgarians/ expected impact	How is impact measured? How to evaluate qualitative impact? Expected impact should be less important than measured impact. The social impacts of partners can be subjective depending on the organization and this needs to be a measurable outcome (e.g. the number of people housed).
Financial health	How is this defined? What is the role of financial reserve? How is this weighted (i.e., is it a tie-breaker or tipping point measure)? Organizations that are doing well get less funding than those struggling but deserve to get investment to sustain and increase their success.
Risk	How is this defined? How is this evaluated? Is it perceived risk or known risk? Is there a risk matrix? Risk is subjective.
Collaboration with other partners	What is the definition of a meaningful partnership? How is collaboration defined and what are the guidelines? Which partners and at what level? Does it include City facilities? Financial collaboration is important. City should have a role in match-making. Some Civic Partners can't collaborate with other partners (need the organization capacity and financial health to do so).
New partner vs. longtime partner	Depends on how this will impact decisions. Longtime partners should have more difficult evaluation criteria.

Evaluation criteria	Questions and comments
Demonstrated community need	How is this measured? More clarity needed – what community, what need? To what extent should this be done by the Civic Partner instead of by The City? Should this be community ‘demand’ instead of ‘need’? Community might have a need that doesn’t align with City priorities. Aligns with value/benefit to Calgarians. Should be used to inform Council priorities.
Organizational capacity	How is this defined and measured (qualitatively or quantitatively)? Do the metrics change? Does this refer to current or desired state? Size can be detrimental to smaller Civic Partners. Need to put the size of the organization in context. Ensure grants take capacity into consideration.

Question 3: What is missing? Any criteria you think should be added?

Theme	Details
Demonstrated impact on the city and Calgarians	Not only demonstrating measurable impact on Calgarians, but also impact on improving Calgary’s positioning at a global level (bringing positive attention to our city, drawing visitors here).
Leveraging other funding sources	Some Civic Partners have other funding sources while some rely completely on City funding. Access to subsidies.
Past performance	Civic Partners with a proven track record should be able to have this considered.
Service offering	The Civic Partners’ specific service offering(s) and the support they provide.
Contribution to City facilities/assets	Option to explain how the Civic Partner runs and/or protects a City asset and/or how it puts money back into City services.

MENTI- What's missing?

Mentimeter was used to complete a quick report back about the table discussions. One participant from each table input the key topics discussed at their table to form a word cloud of what criteria they felt were missing.



Figure 1- Word cloud: What criteria is missing?

Streams

Question 4: If other streams are added, what types of streams do you see as helpful to support the review and evaluation process?

Stream	Details
Responsible for running and/or protecting a City asset vs. not	Based on running and/or being responsible for stewardship of City assets.
Type of service/industry	Based on the type of service the Partner offers and/or the industry in which they operate.
Size/scale of the organization	Separate stream for smaller organizations.
One-time/temporary funding requests vs. ongoing funding	Based on type of request: ongoing funding vs. one-time/temporary (e.g., project-based) funding.
Level of impact/benefit to Calgarians	Participants didn't elaborate on this.
Level of funding need of the Partner	Based on how much funding (high vs. low) is needed by the Partner.
Access to other funding and/or fundraising opportunities	Based on whether a Partner does or doesn't have access to other funding, fundraising opportunities and/or subsidies.
Collaboration between Partners	Separate stream for Partners that collaborate to share funding for a project or initiative.
Funding stays with the Partner vs. flows through	Based on whether the funding remains with the Partner organization or is distributed by the Partner (e.g., through grants) to other organizations and/or individuals.

Part 3: Application Process

Application considerations

Question 1: What do you like about these application considerations?

Participants had difficulty identifying what they liked about the application considerations.

Application consideration	Likes
Templates and deadlines	• Consistent questions are great (help prepare for the next application).
Draft application	• No comments.
Discuss and ask questions	• Good temperature check for ideas. • Could be good, depending on how it works. • Like the idea of touch points to get information to help develop a solid application.
Tools and resources	• Improves fairness because not all Civic Partners know or are well-versed in the application process.
Existing relationship	• No comments.
Space	• No comments.
Evaluation criteria guides questions	• No comments.
Ask only relevant information	• No comments.
Proportionate structure	• No comments.

Question 2: What do you not like about these application considerations?

Application consideration	Dislikes
Templates and deadlines	• Standardized templates aren't flexible for different types of organizations/ streams and those with more qualitative (as opposed to quantitative) data or information to include. • August deadlines are not good due to summer vacations. • Need more advanced notice re: deadlines (three months).
Draft application	• No comments.
Discuss and ask questions	• No comments.
Tools and resources	• Tend to be too general (not specific enough to the types of CPs) and thus not very helpful.
Existing relationship	• Why is this information needed if all Civic Partners have an existing relationship with The City anyway?
Space	• Need more space to explain/provide responses.
Evaluation criteria guides questions	• Unsure whether this takes into account the other reporting and touchpoints (audit material, previous reports).
Ask only relevant information	• No comments.
Proportionate to structure	• Not sure what this means. • Need clarity about desired outcomes and streams before this is determined.

Question 3: What else should be considered?

Participants had many suggestions for other application considerations.

Theme	Details
Clarity about expectations for responses and information provided on the application	Ensure each criterion includes an explanation of what the evaluators are looking for in the response.
Keep in mind that some Civic Partners have limited staff/time for the process	Some Civic Partners operate without sufficient staffing to complete a lengthy application and to dedicate to the draft review process so limit the amount of information and steps in the process where possible.
Provide more details about the review process	More information about the review process is needed: how this process impacts timelines and business cycles, who is reviewing and providing feedback (if it's not the same people, there could be an issue with feedback not aligning with the evaluators' preferences/expectations).
Ensure a clear line of sight between the submissions and funding decisions	Civic Partners were advised to "dream big" for the last budget cycle and that the funding is tied to submissions but in the end, the allocation of funding didn't seem connected to the submissions ("Council just doled out money evenly anyway").
Limit the required information to that which is directly relevant to decision-making	- Only require Civic Partners to provide information/responses that are directly relevant to decision-making and aren't already reported elsewhere. - Don't request information or set criteria that doesn't end up being considered when deciding the funding distribution.
Improve the application form to be more user-friendly	- Consider a downloadable, fillable PDF application form. - Keep it consistent. - Consider the order of questions (if a question will preclude the Civic Partner from consideration, put it at/close to the beginning of the form). - Option to auto-populate fields for long-term/repeat applicants. - Option to save a draft for later review and editing before submitting. - Would like an application form and a reporting form that stays the same for the 4-year cycle.
Provide opportunities for additional information on the application	- Include a question about the implications of the Civic Partner not receiving the requested funding. - Provide space for the Civic Partner to "tell their story". - Allow the Civic Partner to rank their own requests in order of priority to the CP (e.g., Request number 1 of 5 is their top priority and they'd prefer it be funded rather than funding one or more of the other 5).
Allow direct contact with the Civic Partner Coordinator and/or relevant BUs	Opportunity to get help directly from someone (e.g., for guidance in reporting outcomes and measurements, clarifying information, discussing final decisions).
Provide clarity about operating vs. project funding	Are project and operational funding separate and do they require separate applications?
Don't pit Civic Partners against one another	Competing against one another is not desirable.
Provide more information about lobbying	- What is it? - Who are they allowed to talk to?

Making it easy

Question 4: Based on your experience, what makes an application process easy?

Participants repeated some earlier themes, like simplifying the process, being provided with more detail and the opportunity to have more contact with City Administration throughout the process.

Themes	Details
Informational support	Communication was brought up several times as being a key factor in ease of applying.
Transparency/clarity	Transparent process and clarity on direction, definitions and expectations.
Evaluation clarity	Clarity specific to how applications are evaluated came up frequently.
Adequate timelines	Timelines that adequately support the needs of the Civic Partners (fiscal year, staffing to write and report on funding applications, predictability)
Remove redundancies	Update application process to reflect only that which is needed and clear out redundant or overlapping sections.
Simplified form	Make it user friendly, pre-populate data, easy to follow checklist.
Equality/equity	All Civic Partners treated equally.
Consistency	Consistent expectations from all parties.
Financial audit	Transparent statements.

Question 5: Supporting information- What supporting materials could be provided to support you at this stage of the process? In what format?

In general, participants were interested in more details and support, as well as a streamlined process focused on only providing the information The City needs.

Themes	Details
Examples/instructions	Providing clear and successful examples with finely detailed instructions.
Draft support	Feedback, communication with Administration and an evaluation rubric.
Simplify	Only ask for what Assessors need, clear instructions, remove redundancies.
Evaluation specifics	How is criteria weighted, add evaluation rubric, examples.

Question 6: What is the ideal amount of time to complete a funding application?

Civic Partners had a wide variety of answers to this timeline question. The following answers are listed in frequency of response and though details were sparse on this type of question, the disparity of the answers demonstrates a desire for an approach that isn't one-size-fits-all.

1. 4-6 weeks
2. 2-3 months
3. Depends on extenuating factors
4. 1 week
5. 1 day (or less)
6. 2-4 weeks

Communication

Question 7: Opportunities to ask questions- At what points in the application process would you anticipate needing/wanting opportunities for two-way conversation?

Though a timeline-based question with straight forward answers, the overarching message here seems to indicate a desire for a high amount of communication throughout the process. The following answers are listed in frequency of response, though it should be noted that some Civic Partners chose more than one answer.

1. Throughout the process
2. Before submitting/during draft phase
3. Whenever Council updates or changes priorities

Question 8: What would be the best way of providing these opportunities to you?

Generally participants demonstrated an uptick in communications quantity and quality across the board.

Theme	Details
Meetings	• One-on-one touch base meetings, ongoing as needed.
Email	• Ongoing, personal communication.
Portal/FAQ	• Up-to-date portal for Civic Partners with a living FAQ document.
Time with Council	• Opportunities to speak in front of Council to relay what's important to each Civic Partner.

Content

Question 9: What information do you wish you could submit to a funder to support your funding request, but don't usually have an opportunity to? (e.g., data)

A desire to tell a more fulsome story was expressed by many participants.

Theme	Details
Storytelling	• Long-form, open ended opportunity to demonstrate full needs and specifics without length or formatting constraints.
Multi-media (non-text based)	• "Full package submissions" - videos, audio interviews and presentations, interactive materials, infographics.
Impact reports/ Endorsements	• Show the full scope of what a Civic Partner .
Community feedback	• Similar to impact reports and endorsement, widespread community user feedback to demonstrate need and value.
Long-term reporting	• Year over year demonstratable value and support.
Core funding	• Ability to demonstrate how this funding is necessary, rather than additional funds for nice-to-haves.

Part 4: Reporting

Question 1:

Looking at the existing reporting template, what do you feel is the most meaningful information for Civic Partners to report back to Council that demonstrate the impact of the City's investment? Which are the least? And why?

Section of reporting template	Most meaningful	Least meaningful	Suggestions for improvement
Question 1- Organizations mission and mandate		- This question doesn't tell the full story. What/Who is the report intended for (Public, City administration, etc)? - This question is redundant as it is a cut & paste question with information that can be found on the website.	Core mission loop back- the how- why do they exist? STORY- why they do what they do.
Question 2- Results that align with city strategies and priorities	- Storytelling opportunity that helps build context. - The space given to this question is important and shouldn't be limited by character count.	- Concerns over what 3-5 things the committee or administration will be looking for. - This is a limiting question since the top 3-5 results may mean the most to the organization and their mission, but doesn't align with City strategies/priorities, which are always changing and the organization will need time to catch up.	Priorities don't make sense for all civic partners- questions assume groups are alike and have a similar mission.
Question 3- Performance measures	- This is a critical question since this changes based on the organization and effectively represents the organization. - An opportunity to show value and report back to community - metrics tailored to an organization, good table, concise and open ended. <i>Multiple green dots with no additional comments</i>	Is this something The City wants measured? Can we know this ahead of time? And so what? Need the ability to tell the personal story of our impact – what does The City want to specifically know about the zoo vs the library (might be different).	Could we add a section about 3-5 top initiatives and achievements and the impacts of them? Each org could then highlight their achievements.

Section of reporting template	Most meaningful	Least meaningful	Suggestions for improvement
Question 4- Benchmarking	Like that it is industry specific.		
Question 5- EDIB Question 6- Truth and Reconciliation		#5 and 6 while important, not necessarily reflective of our mission/what we provide community- more questions to tell our story? - How is White goose Flying Report used? - not funding a program or service necessarily.	#5 and 6- could this be a 2A and 2B- referenced but not part of snapshot? - Have been identified as priorities so must be built into guidelines and assessment from beginning, not added on during reporting.
Resources Question 7: Funding allocation	<i>One green dot with no additional comments</i>	- Arbitrary to say how it's allocated, don't track to that level, admin burden, not apples to apples, could answer whatever way, what does this section get at- "how do you distribute the funding?" different partners different approach, what is the usefulness. - People guesstimate this – would be difficult to get this accurate. - City will get this through audit if we have to use your auditors. - Already in financials. - Changes year to year. - All goes into operations – not a lot of value breaking it down.	- Don't ask to provide information that was already provided in the financial audit. - Question should be "what does this \$ figure support?" - is it generally supporting or very specific? "How is funding supporting your operation?" Changes year to year. - Add funding leveraged - "in kind"?? Support from other civic partners. - Add amortized expenses (cost of replacement). - Add space for operating AND column for one time funding .
Question 8- Volunteers	<i>One green dot with no additional comments</i>		

Section of reporting template	Most meaningful	Least meaningful	Suggestions for improvement
Question 9- Awards and recognition		• How is this evaluated – “has your organization received any awards” – we would rather tell a good story about how we impacted the community instead. • Too varied across civic partners.	• Better to have a section to highlight top 3-5 initiatives of organization and impacts. • How much did you do? With what impact? i.e. how are Calgarians better off for it? • The opportunity to mention awards or other recognition, although would like the opportunity to include 'success stories' because not everyone wins an award (especially if there aren't any awards opportunities that apply to the CP).
Question 10- Addressing climate change		• This is a challenging issue which may align more with certain organizations and is something they may like to do but isn't a priority. (e.g. Telus convention center is busy 31 days of the month and can't “turn off lights”). • Recognize that everyone is on a different path and has different capacity and revenue/capital funding to implement these measures. • Older facilities may struggle with funding to achieve this. • How is this measured? • Only if relevant to organization or funding. • Not helpful yearly, mostly capital focused, maybe for budget cycle.	

Section of reporting template	Most meaningful	Least meaningful	Suggestions for improvement
Question 11- Capital projects	Helpful information to share with others.	- If looking at operating then why ask about capital, why are 3-5 highlights relevant. - Duplicating capital program.	

Question 2:

What additional reporting questions would you like to see added, if any, to allow you to your story, demonstrate the impact of your work and the value of The City's investment?

Additions to reporting	Example comments
Qualitative data and storytelling	- Beyond the numbers, where is the meat? Human side of it versus data side. - Not always quantitative. - Storytelling opportunities- want the human side. - Would rather have a few key questions that require thoughtful and meaningful input than high-level questions that don't adequately convey the work/impact of the CP. - No lobbying as per TOR then can not tell story - Wants opportunity to do this somehow.
Civic Partner future plans and outlook	- CP's future plans (e.g., 1 year, 3 year, 5 year). - Not a lot of space to talk about future growth. - Template is retrospective look - one question to review performance and then speak to what is done in future.

General comments for improving reporting

Theme	Explanation and example comments
Only ask what you need to and increase transparency of why	- Where does the information go when they've submitted it? Where is it reported? - Draw a sight line between the information requested and its purpose. - How does criteria get informed for report? - Where does the "snapshot" go? Do people read it or is it a tick box exercise? - Less is more – focus on core information The City needs to support the program- what do you really need from us? Specifically if they take resources to do these forms and they don't even know what is done with it inside The City. - Does Council even read the reports? - Reports on results - where does that info land? - Include with a circle-back - no feedback on what content was reported, how did it support/inform money decisions (ex: your results led to X,Y,Z... or did not lead to). - Remove questions that have us regurgitating information The City already has from us .

Theme	Explanation and example comments
Civic Partners are unique and reporting should be more customized	• So many variables across partners. • Reporting on things that can't necessarily be compared across organizations- some programs are more ad hoc, others very centralized data. • Organization specific questions should be created - what are your specific evaluation measures? • All partners have unique reporting needs. • Allow partners to tell or report back on what is meaningful, can't be everything to everyone.
Clearly communicate expectations	• General feedback: What does The City need from the questions - what does Council want to see and how do both use this info? • Understand what is expected of the organization by Council. • What does Council want to hear and why? Priorities can move very fast, like climate change. • Council- investment makes a difference, impact, accountable for the funds- how does this inform decisions? Council opinion?
Full circle with application	• Alignment to application information- full circle of what you did. • KPI's- consistent with reporting. • Missing tie-in to original application - what did they apply for? Report on that.
Timing	• Can the template be provided at the end of each year so they have time to figure out what information they need to collect for the report? • Provide the template at the same time each year. • Alignment with board appointment. • Sufficient time needed for reporting process. • Report on completion of fiscal year in June- have to report on last 9 months- old news/ out of date data.
Keep the users in mind	• Keep the applicant in mind when preparing the report template (i.e., ease of use and amount of info requested) and don't just think about what The City wants to know. • Individual CPs (especially smaller ones) can't necessarily gather performance measure data requested by The City due to time and \$ needed to do it. • Notice takes time to understand/ evaluate/ reply. • Auto-populate with information already submitted to save time for partners with limited capacity.
Keep it consistent	• Keep the template consistent each year (e.g., don't add benchmarking questions out of the blue and without warning). • Reporting is way easier than application process/ operations template – please keep the questions the same. • Consistency of form/templates also a positive because it gives benchmark to see improvements or challenges.
Focus on the changes	• Can we do a “what’s new?” or “what’s changed?” instead of submitting the same form every time?
Tone and purpose of report	• Purpose of reporting- report back versus judge and evaluate.

Theme	Explanation and example comments
Concerns regarding Council priorities	• Currently 1/3 of page relates to Council priorities NOT partner work (in snapshot). • Committee chair priorities is/ are not the same as application and Council priorities. • Council Priority/ Agenda changed - how do you respond with RBA when the process is limiting? Metrics don't change with Council's - Nimble to highlight what is current in community "hot topic" can't do that with standardized form.
Operating costs aren't always meaningful	• May put \$ into upgrades (like boilers), but it won't meet "meaningful" evaluation priorities.
Increase word count	• Fully constrained when completing the form: word count (can't tell the story of unpaid work in organization. • Constrained to provide meaningful content in template.

Part 5: Transparency

Grant Review Committee and Council

Question 1: What do you want The City to consider when developing the Review Committee?

Theme	Examples
High level of knowledge about the Civic Partners	• Knowledge of partners key operations. • Include Civic partnership consultant. • Knowledge of sectors partners serve. • By funding stream, do the people on the committee have an understanding of what we do? Have they visited? They should be required to come to our facility for a tour so they have first-hand knowledge. • Understanding of civic partners and our impacts/benefits.
Diversity, representation and overall experience	• Multi-discipline expertise. • Fair representation. • What level of administration would be on the committee? • Diversity of perspectives. • Experienced but diverse representation. • The experience of the members. Communication and diversity. • Inclusion of non-city staff perspective (peers, citizens, people who benefit from partner programs). • Diverse representation such as front-line officers, management and politicians.
Committee members recognize and respect the unique purpose and service of each Civic Partner	• Unique nature of different partners. • While many of us have similarities, we each have unique missions. • Every partner is unique and may have very specific mandates. • See each civic partner individually. Not compare to other civic partners. We are all different in what we offer. • Each partner is different. Our capacity should be weighted.
Experience with grants and funding	• Their skills and abilities regarding granting. • The city should ensure that the grants review committee has experience in granting. • Grant experience.
Good communication between Partner and Grant Committee	• Ability to ask questions of organizations and partner admin experts to understand needs more deeply. • Partners to connect with Grant approvers and Council directly.
Transparency	• Also should identify the individuals on the committee. • Transparency.
Partners being able to present to the GRC	• Ability for partners to present to the committee. • Ability to present and have the committee question the applicant.

Theme	Examples
Grant Committee understanding the importance of funding	• The importance of core funding. • The operating grant is for core costs. How to re-justify or “sell” those year to year.
Fair perspective	• Objectively. • Conflict of interest.

Question 2: What are the key pieces of information that should be shared with Council to support their final approval?

Theme	Examples
Partner impact on Calgary and benefit to Calgarians	• Principal impact story. • Our long-term impacts to the city and community. • Positive Impact we have had on community. • WHY the Civic Partners are impactful. • Economic impact on Calgarians.
The risks of not fully funding Partners	• Consequences of not funding. • Importance of funding is to the success of the organization. • The consequences of underfunding. • Impact if funding not provided.
Complete application or unedited content	• Information directly from the application. Not edited. • Full application. • That Council should see all applications. • Council should have the opportunity to see the full application.
Past performance and success	• Stories of success. • Executive summary - Key metrics - performance achievements. • What our strategy is. What we’ve done well. • Performance measured against agreed upon metrics.
Total funding request against the recommendation and rationale for the difference	• Council should be told the total funding requested by partners and what is being recommended. • If a group has asked for more than recommendation. • The rationale for the grants committee making a recommendation that is different than the ask. • Assessment notes and context for recommendation.
Key information about each Civic Partner	• Council needs to know prior to submission, what each civic partner does and their mission. • Key bullets and messages on benefits and challenges for civic partners. • What our strategy is. What we’ve done well. • Size of Civic Partner.
Funding history	• The ask versus previous amount. What is the spread? • Funding level history along with history of results.

Theme	Examples
Alignment to City priorities	• Alignment with City strategies and Council priorities. • Alignment to City/Council priorities.

Transparency and confidence

Question 1: What actions, documents or activities would give you confidence in this process and that it is being presented in a transparent way?

Theme	Example Comments
Change the tone of the process and application	• Reward system versus punitive. • Need tone reset. Want to hear “our Civic Partners do great work, we will maintain current funding (start here). We trust you. We value you. We will reward you with new dollars when they arrive not take away what you currently have.” • They want to hear that base funding is in place. Reward and recognize opportunity and growth instead with this money.
Provide information for session in advance	• Pre-package- Trust and transparency starts with sharing these materials in advance. You will get more from us in session.
Need more detail and information	• Timelines- milestones, reporting, communication. • Evaluation specifics- how are we REALLY evaluated? Stages, feedback. • Saw high level titles but not how it would be applied i.e financial- what if we meet? What if we don’t? i.e. is a rainy day reserve seen as a positive or negative? • More established timelines and stage gates. • Reporting/communicating steps before Council. • ToR- lobbying- what does the prohibition really mean?
Keep Partners involved	• Reconvene on early draft. • Staged approach to developing each of these criteria more fully. • When early draft of guidelines ready, reconvene partners by stream to re-evaluate.

Part 6: Unresolved questions and sensitivities

The following list of questions was compiled from the parking lot board that was set up for participants in the session, as well as *from questions that table facilitators captured in their notes.*

Theme	Questions and comments
Definitions	• The definition of a “Civic Partner” and the criteria to be/ become a Civic Partner needs clarification. • Will The City define purpose and goals or will the partner?
Structure and implementation of new grant	• Transition process- how does this work? How is the transition? • Will this be on current 4-year operating/ budget cycle or will this be changed to annual? • This process will be complex and create a lot more work from City and Partners perspective. To what end? Will funding structure change? • This structure should not be used for base operating funding. This is more/ better suited for one-time funding.
Lobbying	• The “NO LOBBY” discussion must come back and it must die a horrible death. Some of us, without lobby, wouldn’t still be around... • Lobbying- when/ where is this addressed? • No update on Council role? Lobbying? • How does Councilor representation influence and is that part of lobbying? • Prohibition on lobbying- what does this mean? What is this trying to achieve? Opportunity to talk specifically about this.
New Civic Partners	• How are Civic Partners evaluated and added or removed? • Where does the evaluation for new or competing organizations come into the process? Before or after? • Who is a Civic Partner who is not (pre-the grant process)?
Review Committee/ Council	• The composition of the grants review committee. • No information on who is evaluating? • Does Council have access to applications? • How do we inform Council what civic partners actually do?
Capacity	• Labour needs to support this? (internal)

Part 7: Session Evaluation

I loved...

Theme	Comments
In person networking and learning	• Getting Civic Partners together in the same room. • Getting all Civic Partners in the room. • Learning from other civic partners. • Networking.
Opportunity to participate	• The opportunity to provide feedback. • Having the opportunity to participate in this process.
Engagement techniques	• Liked the Menti as we can share more confidentially. • Breakdown of issues/process into 15 mins increments.

I wish we could have...

Theme	Comments
More opportunities for City and Civic Partners to come together	• More City hosted Civic Partner collab sessions. • Another added- Great idea! • We had more opportunity to interact with Civic Partners and Partnership staff.
More time	• More time on the implementation plan and timeline.
More information	• More details on what was meant by some of the points discussed. • Review city strategies, goals and priorities first.
Talked about these topics	• The ban on lobbying. • How to report on social qualitative impact. • Reporting on qualitative metrics .

Next time...

Theme	Comments
Share content for session in advance	• Could we have the slideshow in advance? More time to reflect and come with more ideas. • Share in advance your questions and content. Not everyone thinks quickly and needs time to process. Please consider this in respect to different people's brains and... (unclear) . • Provide details and more information before the session .
Divide up the group	• Group the streams to see what issues and thoughts it flushes out.
Provide lunch	• Next time sandwiches without mayo- lol! (I forgot my lunch today).

Theme	Comments
Host specific sessions on these topics	• Nice to have in-person workshops. • Next workshop on: • Detail on evaluation process. • Details on reviewing committee. • Details on Lobbying clause. • Details on timeline.