



Civic Partner Operating Grant Program Engagement: May 2024 Workshop

What We Heard Report

June 18, 2024

Table of Contents

Executive Summary	2
Project Background.....	3
Engagement Overview.....	4
Previous Engagement	4
Current Engagement	4
Timeline.....	5
What We Asked and What We Heard	6
Review Criteria	6
Questions	6
Summary	6
Details.....	7
Lobbying.....	15
Question	15
Summary	15
Details.....	16
Draft Guidelines.....	18
Questions	18
Summary	18
Details.....	19

Executive Summary

On May 27, 2024, The City hosted an in-person workshop with representatives of The City's Civic Partners. Thirty-seven representatives from 21 Civic Partners attended, along with members of the Major Partners team. The workshop was a follow up to one held on January 29, 2024, at which Civic Partners were asked for their input on the guidelines, including the review criteria, Partner streams, application process, evaluation process, reporting requirements and the evaluation committee.

During the time between the two workshops, the Major Partners team created the draft Guidelines document. The purpose of the second workshop was to gather Civic Partners' input on potential application questions for the review criteria, ways in which The City can support Civic Partners, Council, and the evaluation committee regarding the no lobbying requirement and to get Civic Partners' feedback on the draft Guidelines in general. This report summarizes the Civic Partners' input from the workshop discussions.

The overarching theme of the table discussions was that Civic Partners need more details about the draft Guidelines before they feel equipped to answer questions about the document. Participants had more questions than they had answers to the questions asked of them during the workshop. They expressed a need for clear definitions, explanations, and examples throughout the draft Guidelines, for timelines regarding the process and the no lobbying requirement, and for more information about the evaluation committee.

A key theme that emerged regarding the review criteria was concern about applying standard criteria to all Civic Partners, given the uniqueness of each organization and the community needs they address. There is a desire to see at least some of the review criteria be customizable. Additionally, it was brought up several times that they want to see how review criteria will be weighted and/or the rubric that will be used for evaluation. Participants were also concerned about and had questions regarding the review criteria, specifically those about community need for Civic Partners' programs and services, track record, benchmarking, and partnering with other organizations. It was also mentioned that some of the information that Civic Partners will be asked for in their applications is already reported elsewhere (e.g., in the Civic Partner Annual Report), duplicating information and effort. Later in the workshop, some participants suggested the application and process could be more streamlined to reduce this redundancy and simplify the process.

Suggestions for additions to the review criteria included expanding some of the existing criteria. For example, adding issues of accessibility, safety, and security to the criterion regarding the impact of inflation and other pressures on a Civic Partner's operations. Another frequent comment was the need for Civic Partners to be able to "tell their story" in their response to the review criteria. Other suggestions included adding review criteria regarding the Civic Partner's "wish list" and growth plans.

Participants were asked what The City could do to support the no lobbying requirement for applicants, Council, and the evaluation committee. Suggestions from the participants included clear definitions (e.g., of lobbying, education, and advocacy), a timeframe, explicit rules, and an opportunity for applicants to present to Council and/or the evaluation committee. However, participants spent much of the time discussing their concerns about and frustration with being prohibited from lobbying. They cited the need for them to be able to lobby, asked what it might mean for Civic Partners with Councillors as Board members, and wondered if and how the requirement will be enforced. Participants had many questions about this section of the draft Guidelines and wanted to know more details.

The final topic addressed in the workshop was the draft Guidelines in general. Participants were asked for suggested changes to the document, if there were other areas they wanted to discuss, and what questions they had that are not addressed in the draft Guidelines. Again, participants wanted more detail added to the existing content and they had many questions. The evaluation committee was a topic of discussion and participants wanted to know who will be on the committee and how members will be selected. Some participants foresee the application questions under some of the review criteria as being redundant with what they are required to report elsewhere.

Finally, some participants expressed that they do not feel that their input is being valued or used, giving as an example the fact that the no lobbying requirement remained unchanged since the last workshop despite the feedback given about it at that session. One table of participants wondered aloud why Civic Partners were at the workshop if there wasn't something more concrete or detailed (e.g., a mock application and rubric) on which they could provide feedback.

Some of the themes that emerged from the input provided by participants at this workshop reflected those in the [What We Heard Report](#) for the January 2024 workshop. These themes are the need for more details and clarity about all aspects of the application and process and the challenge of answering questions in the absence of this information, reducing duplication in the application and required Civic Partners reporting, and the opportunity to meaningfully “tell their story” to the evaluation committee and Council.

Project Background

In December 2022, Council adopted a Notice of Motion (EC2022-1378: Developing a Civic Partnership Program) that directed Administration to create a Civic Partner Operating Grant Program (the 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 (ToR). The key concerns that emerged included the no lobbying requirement, the future level of Council oversight and their continued participation as Board members and the grant review committee. Additionally, participants shared concerns about the Program's potential lack of transparency and understanding of the complexity of Civic Partner's work. Finally, “equitable distribution of funding” raised many questions.

The ToR were approved by Council on November 28, 2023 and form the foundational approach for the Program. It 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 ToR 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.

Engagement Overview

Previous Engagement

To aid in the development of the Program details and processes, Civic Partners were engaged in late January 2024. An in-person workshop was held during which Civic Partner representatives were asked for their input on the guidelines, including the review criteria, Partner streams, application process, evaluation process, reporting requirements and the evaluation committee. An [online portal page](#) was used to provide an opportunity to participate for those who were unable to attend the in-person workshop 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. The input was considered by the Major Partner's team in the development of the draft Guidelines. See the [What We Heard Report](#) for more information about that phase of engagement.

Current Engagement

The Major Partner's team sent the draft Guidelines to Civic Partners on May 23, 2024, ahead of the second workshop held on May 27, 2024. All Civic Partners received an invitation to the workshop. Civic Partner representatives (37 representing 21 Civic Partners) attended to participate in table discussions. Members of the Major Partners team were also in attendance to participate in the discussions and answer questions. A member of The City's Engage Resource Unit or other City staff was assigned to each table to facilitate and take notes. The [online portal page](#) was again used as an opportunity for participation for those unable to attend the workshop and for participants who wanted to share more feedback after the session.

The objective for this phase of engagement was to collect input from Civic Partners about:

- Questions they think could or should be asked for each review criterion.
- Ways in which Major Partners can support Civic Partners, Council, and the evaluation committee in terms of the no lobbying requirement.
- The draft Guidelines overall.

Participants were also informed of next steps in the process. Prior to beginning the table discussions, each participant was given a paper copy of the draft Guidelines document for reference throughout the workshop.

Timeline

Timing	Milestone
December 2022	Notice of Motion (EC2022-1378: Developing a Civic Partnership Program)
October 2023	Opportunity for Civic Partners to provide feedback on and ask questions about the draft Terms of Reference
November 28, 2023	Council approves the Terms of Reference for the Civic Partner Operating Grant Program
January 20, 2024	In-person workshop with Civic Partners #1: Gather input on the guidelines, process, and related aspects
January 20 – February 11, 2024	Online portal page open to collect input
March 2024	Workshop #1 What We Heard Report shared with Civic Partners and published on the online portal page
May 23, 2024	Draft Guidelines document shared with Civic Partners in preparation for workshop #2
May 27, 2024	In-person workshop with Civic Partners #2: Gather input on certain sections of the draft Guidelines as well as on the document overall
May 30 – June 9, 2024	Online portal page open to collect input
Q3 2024	Brief to Community Development Committee

What We Asked and What We Heard

Note: This section uses the abbreviation “CP” to refer to Civic Partners and “the Committee” to refer to the Administrative Grant Review Committee.

Review Criteria

Questions

1. What application questions could be asked for each review criteria?*
2. Are there any key review criteria you think are missing?

*To answer the first question, participants were invited to write potential application questions on post-it notes and attach each to the relevant criterion on flip chart pages along the wall of the room. Participants did this following table discussions on the topic.

Summary

While participants suggested some potential application questions for each of the ten review criteria, they spent more time discussing the review criteria at their table and sharing their many questions and concerns about them. Some participants mentioned that it was difficult to generate potential application questions for each review criteria because they viewed them as lacking detail and explanation. The common themes in the comments and questions about the review criteria were:

- Need for more details, definitions, explanations, and examples regarding the review criteria.
- Concerns about applying standard review criteria to all CPs (i.e., using a one-size-fits-all approach for unique CPs).
- Concerns and questions about metrics (what to measure and how) and the use of benchmarks (what benchmarks and against whom to compare).
- Uncertainty regarding partnerships (who can be considered a “partner” for the purpose of the criteria and concern about CPs being penalized for not having a partnership with other organizations).
- Being required to report information in the application that has already been reported elsewhere in the process (e.g., Civic Partner Audit Report).

When asked what review criteria are missing, participants suggested things such as expanding some of the existing criteria, being able to explain what the impact would be if the CP couldn’t continue operating without the requested funding and asking about the CP’s growth plans.

Details of the feedback received follow in the next section.

Details

1. What application questions could be asked for each review criteria?

Note: Questions have been paraphrased to ensure clarity and duplicate questions have been excluded.

Review criteria	Suggested application questions
Clearly defined community need for the Civic Partner's organizational programs and services and clear identification of how the Partner's operations, strategies and plans meet this need.	• Which of these community needs do you feel best represent the CP/do you feel the CP best supports? • What is the level of community need? Please include relevant data/statistics. • How do you/will you meet community needs? • How does your mandate/impact model serve community/improve the quality of life for Calgarians? • How does the CP impact community experiences, services and needs through its operations, strategies, plans, and programs? • In what ways is the CP positively impacting Calgarians' lives socially, economically, and culturally? • How does the CP fill a gap or meet a unique need within the community? • Who is the primary community for the CP's work? • What is the demographic make-up of the audience(s) the CP reaches? • Which areas of the city are served by the CP? • How many Calgarians does the CP reach/interact/serve/impact within a year? • What is the CP's participant satisfaction level and retention rate? • How many not-for-profit organizations held an event in the CP's space last year? • How many delegates were welcomed into the space in the last year (breakdown of number of local, national and international delegates)? • How does the size of the CP impact the work you do or could do? • What is the economic spin-off generated by the CP? • What is the CP's strategic plan? • What can the CP do with more funding? • What can be prioritized with less funding? • How well does the CP align with applicable civic policies on which you are named or mandated?

Review criteria	Suggested application questions
Results for Calgarians that align with Council priorities or focus areas and either extend or complement existing City services or meet a demonstrated need not already addressed by The City.	• On a scale of 1 (not at all) to 10 (fully), how aligned is the CP with Council's priorities? Expand on the alignment rating using examples. • Which City strategies or priorities does the CP support? • How does the CP supplement The City in the CP's mission to meet the needs of Calgarians/what community needs does the CP meet that aren't addressed by The City? • Which Council priorities does the CP/its mandate align with? • Is the CP named in a Council policy or priority? • How does the CP ensure its programs and work plan are relevant and align with The City?
Track record of delivering results and clearly identified future success measures including quantitative performance measures and, where appropriate, qualitative measures.	• What is the track record over the last 3 to 5 years? • How has the CP delivered results to Calgarians in the past 4 years? • How has the program helped in delivering the planned results? List all qualitative and quantitative metrics used to measure this success. • What specifically has the CP done to meet its objectives in last several years? • What does success mean to the CP in the next 4 years?
Provide context for performance by comparing against benchmarks for a Partner's sector or performance comparisons with counterpart organizations, as appropriate.	• What benchmarks (internal or external) does the CP use to measure success? • What are the top 3 benchmarks the CP uses and why? • What benchmarks is the CP using to measure its performance against other similar/relevant organizations in its sector? • How does the CP's results compare with similar organizations either in the city or across the country? • Against whom/what does the CP benchmark? • How is the CP doing?

Review criteria	Suggested application questions
Demonstration of how the Civic Partner addresses City policies and strategies related to equity, anti-racism, Truth and Reconciliation, and other key considerations as community expectations and City approaches evolve over time.	• How is the CP adhering to and aligning with relevant City policies and strategies? • On a scale of 1 (not at all) to 10 (fully), how aligned is the CP with relevant City policies and strategies for each of: equity, anti-racism, and Truth and Reconciliation? Expand on the alignment rating using examples. • Which equity-deserving groups does the CP serve? • What accessibility (physical, financial) initiatives/programs does the CP have in place to address the needs of Calgarians? • Provide the CP's policies related to equity, anti-racism, and Truth and Reconciliation. • How does the CP embed/center equity, diversity, inclusion, accessibility, anti-racism and Truth and Reconciliation in its work (operations, governance, and programming)? • How does the CP intend to further equity, diversity, inclusion, accessibility, anti-racism and Truth and Reconciliation in its work during the next 4 years?
Leveraging opportunities to collaborate with other Partners, where appropriate, to achieve shared results.	• How many active partnerships does the CP have in place? • How does the CP work with other partners or organizations to deliver its work? • What benefits/collective impact has the CP achieved through partnership? • Give examples of the impact of the top partners the CP collaborates with? • Give three examples to demonstrate the types and depth of partnerships that help the CP fulfill its mandate.
A Civic Partner's financial health and sustainability based on annual results of the Civic Partner Audit Report financial review process, Civic Partner Annual Report and related information.	• What is the CP's anticipated future revenue? • Did the CP need to take financing out of its reserves? • What is the CP's working capital? • What is the amount of money used per program? • What specifics contributed to the CP's financial health of a specific year? • What will happen if funding isn't provided to the CP? • What is the cost of operations of relevant markets? • What is the CP's financial health measurement and how did it score?

Review criteria	Suggested application questions
Structural considerations that impact organizational capacity including a Civic Partner's size and scale, and operating model. For example, consideration for opportunities to leverage other funding sources including earned revenue.	• How many employees does the CP employ? • Did the CP access other forms of government funding? • What funding is available from other sources?
Impact of inflation, population growth or other pressures on a Civic Partner's operations.	• What challenges to delivering results does the CP face due to its physical location? • What inflationary pressures is the CP experiencing and what impact is that having on its ability to meet its mandate? • How will funding help the CP address issues related to inflation?
Management or operation of a City-owned asset, or stewardships of a City collection or asset.	• What is the capital plan for the asset over the next 1 to 4 years and is it on track? • In what condition is the asset? • What is needed to run this asset?

Participants provided additional feedback about the review criteria:

Theme	Details
Clarity, details, and transparency	• Need clear definitions, explanations, and examples • Use plain language • Be transparent about the rubric/criteria weighting that will be used to score applications in terms of the review criteria
Comparing Civic Partners to one another using a one-size-fits all approach	• CPs are unique and comparing them will put some at a disadvantage (e.g., arts and culture CPs might not address a dire need but do improve quality of life, some are not able to leverage other funding and are completely dependent on City funding) • Some CPs might address only one need but it's critical and relevant • Inflation and other pressures impact some CPs more than others • Need some customized criteria (suggestion of 20% of the criteria)
Partnering with others	• Concerns about being penalized for lack of partnerships due to lack of availability or good fit • Uncertainty about what happens to the one Partner's funding if the other Partner in the partnership is not granted funding

Theme	Details
Benchmarking and other measurements	- Concerns about how benchmarks are selected, who selects them and their applicability to various CPs - CPs need input on the benchmarks to be used - Uncertainty about how to measure things (e.g., social impact, success) - Lack of resources needed to focus on measurement and benchmarking - Concerns that numbers/measurements don't tell the full story of a CP's impact
Duplication of information and effort	Review criteria is redundant with information reported elsewhere in the process (e.g., Civic Partner Annual Report, Civic Partner Audit Report)

Participants asked the following questions about the review criteria (questions have been paraphrased to ensure clarity and duplicate questions have been excluded):

Review criteria	Questions asked by participants
Clearly defined community need for the Civic Partner's organizational programs and services and clear identification of how the Partner's operations, strategies and plans meet this need.	- How is "community need" defined and who defines it? - What is a "community need" vs. "community want"? - What are examples of community need? - Does the definition of community need change with each new Council? - How can we measure the magnitude and scope of community need?
Results for Calgarians that align with Council priorities or focus areas and either extend or complement existing City services or meet a demonstrated need not already addressed by The City.	- If Council's objectives/policies/strategic vision change from one Council cycle to another, how will this impact this process and our partnership agreements? - How can CPs be expected to change their focus every four years to align with each Council's priorities?

Review criteria	Questions asked by participants
Track record of delivering results and clearly identified future success measures including quantitative performance measures and, where appropriate, qualitative measures.	• What is meant by “track record”? • How far back does the track record go? • How is track record success measured? • What if a CP’s track record was negatively impacted by the pandemic? • What if we don’t have long term data to show how the CP has impacted Calgarians? • How can new CPs meet this criterion?
Provide context for performance by comparing against benchmarks for a Partner’s sector or performance comparisons with counterpart organizations, as appropriate.	• To what extent are benchmarks a factor? • Against whom should a CP be benchmarking itself? • Should CPs be comparing to organizations in another city/province? • How are the benchmarks decided and who decides (e.g., the CP or The City)? • Are Committee members familiar with relevant benchmarks?
Demonstration of how the Civic Partner addresses City policies and strategies related to equity, anti-racism, Truth and Reconciliation, and other key considerations as community expectations and City approaches evolve over time.	• How can a CP measure things like values and alignment with Truth and Reconciliation, etc.?
Leveraging opportunities to collaborate with other Partners, where appropriate, to achieve shared results.	• How is “partner” defined in terms of this criterion? Can collaboration with partners include small “p” partners, not just CPs? • If it’s a joint project with another Partner, is the grant joint? And what happens if one is successful in securing funding and the other isn’t (e.g., does the project still go ahead)? • How does a CP deal with City facilities not willing to work/partner with them? • Is a CP penalized if it doesn’t have a partnership with another CP? • Is this about impact of a partnership or the number of partnerships a CP has?

Review criteria	Questions asked by participants
A Civic Partner's financial health and sustainability based on annual results of the Civic Partner Audit Report financial review process, Civic Partner Annual Report and related information.	• Would strong financial health and/or ability to generate earned revenue be viewed positively or negatively? • How can a CP ensure it isn't penalized during a good year or when it has multiple revenue/funding sources?
Structural considerations that impact organizational capacity including a Civic Partner's size and scale, and operating model. For example, consideration for opportunities to leverage other funding sources including earned revenue.	• How would a CP's ability to leverage other funding or revenue impact their application (positively or negatively)? • Who decides the appropriateness of CP staff compensation and how is it decided? • If a CP can't leverage other funding sources, do they get priority over those who do when funding is allocated?
Impact of inflation, population growth or other pressures on a Civic Partner's operations.	• No questions
Management or operation of a City-owned asset, or stewardships of a City collection or asset.	• What if a CP rents a City building (rather than managing or operating it) and would like to request funding to make it more accessible – where does that fit with the review criteria?

Review criteria	Questions asked by participants
Review criteria in general	• How can social impacts and other non-quantitative impacts be measured? • How can a CP demonstrate how it uses the funding for impact? • Will new CPs be at a disadvantage because they don't have a history and might need more opportunity to tell their story and plans? • When is the opportunity to discuss and ask questions about the specific criteria? • What if there are criteria that apply to some CPs and not others? • Can there be groups (streams), to help offset any biases? • What are the required criteria vs. the optional ones? • How are the criteria weighted? • Where is the rubric for evaluation? • What is the depth of response expected/required? • Are there character limits? • Can CPs reference a previous report for this information or just update the report? • What, if any, information can be 'grandfathered'? Or will the information requested change each year, requiring a new application each year?

2. Are there any key review criteria you think are missing?

- Expand existing criteria.
 - Broaden the meaning of "community need".
 - Include accessibility in the criteria regarding equity, anti-racism, etc.
 - Include issues of accessibility, safety, and security (e.g., How do the demographics, geography and circumstances of the community/communities served by the CP add additional pressures to its operating costs?) in the the criterion regarding inflation and other pressures.
 - Include "small p" partners (organizations that aren't themselves CPs).
 - Include support (rather than actual management or operation) of City-owned assets (e.g., helping to reduce risk to City-owned facilities).
 - Provide opportunities within the application for narratives that fit within the existing criteria (i.e., space to tell their story, examples of impact).
- Positive impacts being made but that do not align with Council priorities.

- Risk to the CP if the requested funding is not granted.
- What the city would be missing if the CP didn't exist.
- A wish list.
- Growth plans.
- Opportunity to showcase the CP's uniqueness.
- Ways in which the CP contributes to The City other than managing/operating City-owned assets.

Lobbying

Question

1. What tools, information or support can the team provide to support the no lobbying requirement for each of: applicants, Council, and the evaluation committee (the Committee)?

Summary

Participants suggested more clarity and details (e.g., definitions, specific timeframe, and explicit rules) about the no lobbying requirement and opportunities to present to the Committee will help support applicants in adhering to the requirement. To support the Committee, it was suggested that the Committee should have a Terms of Reference and clear guidelines pertaining to no lobbying. Participants foresee Council needing clear information and guidelines/rules about the topic, although it was mentioned this likely wouldn't stop a Councillor from wanting to talk to a CP about their application if they really want to.

Like in the section about review criteria, participants spent much of the time discussing the topic, raising concerns, and asking questions about it. The common themes in the comments and questions about the no lobbying requirement included:

- Need for clarity, details and transparency regarding the no lobbying requirement, including why it exists.
- If and how the requirement will be enforced and the potential consequences for contravening it.
- The need to be able to lobby Council to tell their story and make their case for funding.
- CP Boards with Councillors as members.
- Concerns about the timeframe for no lobbying.

Details of the feedback received follow in the next section.

Details

1. What tools, information or support can the team provide to support the no lobbying requirement for each of: applicants, Council, and the evaluation committee (the Committee)?

Group	Details
Applicants	• Clear definitions (e.g., of lobbying, education, advocacy) • Clear timeframe for the no lobbying period • Explicit rules • A lobbying register • Opportunity to present to Council and/or the Committee and/or allow for site visits • A one-pager that addresses what is and isn't allowed and why • CP Board members also need support because some will want to lobby anyway
Council	• Clear guidelines regarding one's position on a CP's Board vis-à-vis grant applications • Clear direction on how to proceed if approached about a CP's grant application • Rules for when and how a Councillor can ask or talk about a CP's grant application
The Committee	• Terms of Reference • Clear guidelines

Participants provided additional feedback about the no lobbying requirement:

Theme	Details
Clarity, details, and transparency	• Need more clarity and details and fewer "gray areas" • Need information about consequences if caught lobbying
Need for/importance of lobbying	• Lobbying is necessary for a CP to properly tell their story to those who will be making the final decision (i.e., Councillors), especially if there isn't an opportunity to tell their story in the application • This requirement results in extra burden on and risk to CPs • Lobbying is transparent because it's public • Part of a Councillor's job is to be lobbied • Lobbying can alleviate the need for a Councillor (especially new ones) to read a multitude of documents and reports to learn about the CPs

Theme	Details
Councillors on CP Boards	- Concerns about CPs with Councillors as Board members and the potential advantage over those without "Policing" their Board members puts CPs in a difficult position
Timeframe	Concerns about the length of time between application submission to the final decision and how it might mean CPs must refrain from speaking with Councillors for a long period of time
Enforcement	- Concerns about if and how this will be enforced - Some CPs will find a way around the no lobbying requirement or will do it "behind closed doors" and have an advantage over those who adhere to the requirement

Participants asked the following questions about the no lobbying requirement (questions have been paraphrased to ensure clarity and duplicate questions have been excluded):

Theme	Questions asked by participants
Clarity about the need for the requirement	- What is/are the reason(s) for the no lobbying requirement? - Why is lobbying viewed negatively? - Does Council understand the unintended consequences of a no lobbying requirement?
Enforcement and consequences	- What will be done about CPs who essentially lobby "behind closed doors"? - What are the consequences for breaking the no lobbying requirement? - Who decides if a line has been crossed in terms of no lobbying?
Timeframe	- How long (in weeks or months) is the no lobbying period? - Can the timeline between application and decision be shortened so the no lobbying period is shorter?
CP Board members	- What if a Councillor sits on a CP's Board - how does that work vis-à-vis the no lobbying requirement (e.g., do they have to recuse themselves from the grant application process)? - Are CPs with a Councillor on its Board at an advantage? - How can CPs keep their Board members from lobbying Councillors, especially given the uneven power dynamic? - What if there is a City Administration employee sitting on a CP's Board and they request information about a submission -- is it considered lobbying if I provide the information?

Theme	Questions asked by participants
General	• If we can't lobby Council, how do we tell our full story, especially to new Councillors? • How can we expect Council to fully understand why and what they are approving or not approving if we don't get the opportunity to tell them our story? • What about a lobbying register? • Can the no lobbying requirement apply to only the Committee and not to Council? • Can Administration be lobbied and if not, shouldn't they be added to the no lobbying requirement? • What do we do if a Councillor asks us about something regarding our application? • If during the no lobbying period, a Councillor wants us to host an event in their Ward but we don't have budget for it, what should/can I tell them so I'm not violating the no lobbying requirement? • What are the rules if a Councillor attends a CP's event during the no lobbying period? • Can we lobby following the decision if we don't get the funding we requested?

Draft Guidelines

Questions

1. Do you have any suggestions for changes to the draft Guidelines?
2. Are there any other areas you wanted to discuss?
3. What outstanding questions do you have that are not addressed in the draft Guidelines?

Summary

Participants' suggestions for changes to the draft Guidelines were mainly related to adding detail to the existing content (e.g., definitions, a rubric, timelines, explanations). A couple of participants mentioned it would be good to add an appeal process. One table of participants raised concerns about the application packages being made public, citing the need to balance transparency with privacy.

Other areas the participants wanted to discuss and ask questions about included streamlining and simplifying the process, the Committee, process timelines, implications of staff turnover (City, CPs, and Council), and lobbying. One table of participants expressed that they didn't feel the input provided at the last workshop had been incorporated into the draft Guidelines.

Participants had many questions that they did not think were addressed by the draft Guidelines, mainly about the application and process but also about the Committee and funding.

Details of the feedback received follow in the next section.

Details

1. Do you have any suggestions for changes to the draft Guidelines?

- Include the following in the Guidelines:
 - clear definitions of all terms
 - more details in each section
 - a rubric
 - specific timelines
 - assumptions underlying the application and process
 - link to The City's strategies
 - information about the scope of partners (in terms of geography and/or type) eligible for partnerships under the review criteria
- Consider an appeal process.
- Reconsider application packages being made public or at a minimum, ask only for the information required.
- Provide a process/mechanism to provide CPs with feedback on their application (strengths, weaknesses).
- Differentiate between stewarding a strategy and providing a service.
- Explain how “reserves” (under Ineligible Costs) are calculated.
- Consider option to negotiate a different financial schedule.

2. Are there any other areas you wanted to discuss?

Theme	Details
Clarity, details, and transparency	• Reiterated the need for more clarity and details in the Guidelines and about the process
Streamline/simplify the process	• Will benefit CPs and their City relationship contacts
The Committee	• Need to know more about who will be on it, how they are selected, their level of expertise/knowledge and how they can be knowledgeable about this area but also unbiased

Theme	Details
Lobbying	• Need an opportunity to present to Council if not allowed to lobby
Staff turnover	• A plan and process to address staff/member changes for CPs, City Partnership staff, and Council to ensure nothing gets “lost in the shuffle” and negatively impacts a CP
Standard grant funding approach	• CPs differ in capacity, administration, and services and support to Calgarians and the approach to grant funding needs to take this into account
Project engagement	• Feeling that feedback is not valued or incorporated to date (e.g., the no lobbying requirement remains unchanged since the last workshop despite the feedback given about it) • Want to see proposed/mock application and rubric and provide feedback on it • Would like a subject matter expert at each table discussion to answer questions on the spot

Participants asked the following questions in this section (questions have been paraphrased to ensure clarity and duplicate questions have been excluded):

Theme	Details
The Committee	• Who will be on the Committee? • If Committee members are not allowed to communicate directly with CPs and ask the right questions, how will this process work? • If the rules preclude too many knowledgeable people on the Committee, then who is left and what quality will there be on the Committee? • Is there overlap between Committee members and “Administrative Leadership”?
Process	• How long will each step in the process take/be allotted?
Other	• Who, at The City, is knowledgeable about our CP and its needs – is it just one person or is there a group so if our City relationship contact leaves, there isn’t a gap regarding that CP? • What are you looking for from us in these sessions and where is our feedback going? • What happens if we’re accused of lobbying but didn’t do it? • What are the next steps?

3. What outstanding questions do you have that are not addressed in the draft Guidelines?
(Questions have been paraphrased to ensure clarity and duplicate questions have been excluded)

Theme	Questions asked by participants
Application and process	• Is this competitive? • Is this a need-based assessment, merit-based assessment, or a hybrid? • Why are we being asked to work within a one size fits all approach when each CP is unique in its services and needs? • Can we streamline this process, especially considering the reporting process already in place? • What if we missed including something on our application or information changes and needs to be updated on the application? Is there an opportunity to rectify it? Will the application be nullified? • What is the timeline from application to decision? • Where is the opportunity for additional, one-time funding requests? • Is there a set of assumptions associated with this process? • What is the appeal process? • Will there be an opportunity for feedback, post-process, on weaknesses of a CP's application? • Will CPs be informed of the rationale for the funding allocation? • What processes do other cities have in place for grant funding and how does Calgary compare? • If a CP is noticeably strong or weak, how does that impact funding? • If a CP clearly articulates a multi-year vision, how would that impact their case for funding? • How do CPs navigate the differences between The City's priorities and Council priorities? • What are the "trust-based philanthropy principles" (page 8 of the Draft Guidelines document)? • How many CPs are in the Related Authorities category?

Theme	Questions asked by participants
The Committee	• Who is on the Committee? • What is the term of a Committee member/how often will the Committee change members? • How is an "expert" defined in terms of Committee members? • How can Committee members be experts but have no conflicts of interest? • How much will Committee members know about each CP and will they understand the role and value of each CP? • How can we ensure the Committee members are reading/paying attention to the "stories" (i.e., responses to open-ended questions)? • Why is it the Committee's role to tell the story of CPs' work? Shouldn't CPs be allowed to do this themselves? • What type of briefing will Committee members get? • Is the Committee the same for all applications? Or does it change based on stream? • Will there be another meeting to discuss the Committee and the review/evaluation process?
Funding	• What are we requesting in terms of funding amounts: is it the minimum needed or can we ask for more to help us grow or can we request a range? • Are we locked in for a 4-year term or can our funding allocation be cut/reduced during that term? • What is the funding envelope? • Will there be a funding shortfall in 2025? • Should we assume stable base funding? • The capital funding process is separate, how does that work? Will it change? Will that impact operational grant funding? • How much is funding impacted by "mandate to exist" vs. possible shifts within and across Council cycle? • Capital is not included, so what happens to capital that is not CPI grant/MSI funded?

Theme	Questions asked by participants
Communications/ support	• CPs have turnover, so what is The City doing to make sure new CP staff responsible for the grant application process are being contacted and supported through the process? • If/when our City relationship contact changes, will we be lost in the shuffle and how will the new contact be educated about us as a CP and our needs? • How will new Councillors be onboarded in terms of this process? • Does our City relationship contact advocate for us or have influence?
Other	• What about newer CPs or those that are shifting their focus and therefore, in a way, are starting anew? • With there be another template for new initiatives? • Are CPs' grant application packages going to be made public (concern about some information being made public)? • Will new CPs be at a disadvantage because you need to be currently funded to be considered, so if you lose one-time funding, you will be ineligible to apply? • Are there plans to grow the Partnership program? • Can we have a CP newsletter like Neighbourhood Partnership Coordinators have for community associations (to network and connect, learn about what other CPs are doing)? • Will CPs with more touchpoints with Administration have an advantage over other CPs? • Is there the potential for a CP to lose its status as a CP as a result of this process?