
City of Kelowna

MEMORANDUM

DATE: November 20, 2002
FILE: 1850-20
TO: City Manager
FROM: Community Planning Manager
RE: Community Social Development Grants
REPORT PREPARED BY: Robert James

RECOMMENDATION:

THAT Kelowna City Council authorize the amendments to Council Policy No. 218 – Community Social Development Grants as attached to the report from the Community Planning Manager dated November 20, 2002.

PURPOSE:

To introduce some changes to the Community Social Development Grant program aimed at improving the efficiency, accountability and understanding of the program.

BACKGROUND:

The Community Social Development (CSD) Grant program was established in the Fall of 1992 by City Council for the purpose of assisting registered non-profit societies and non-profit community organizations to deliver innovative, preventative social programs within the City. In 1999, the Grant to Address the Sexual Exploitation of Youth (SEY) program was introduced. The programs are administered together, and are reviewed by staff and the Social Planning Board annually to determine if improvements can be made, based on the previous year's experience. The most recent changes were made in 2000, and included the addition of an appeal process.

REPORT

Despite past improvements to the grants process, there are annual complaints by applicants, who continue to have difficulty understanding program requirements; this increases the administrative effort required to operate the programs. A staff review suggested changes be made to clarify both the process and the applicants' responsibilities. Discussions were held with the Social Planning Board, and the following policy changes are proposed, with explanatory notes provided:

1. *Change reference to Official Community Plan (OCP) policies which have social relevance.*

- Policy 218 was originally approved by Council prior to the approval of the City's Social Plan.
- Following introduction of social policies, originating in the Social Plan into the OCP, Policy 218 was changed to refer to Chapter 8, where the social policies were contained.
- With the approval of the new OCP in 2002, social policies are now contained throughout the OCP. Therefore the reference is generalized and applicants will be guided to the correct policies using the terms of reference for the applications.

2. ***Proposals that offer services or programs that cross municipal boundaries will be considered; however, grant funds may only be used for those portions of the program that are delivered within the boundaries of the City of Kelowna for the benefit of Kelowna residents.***
 - There is a growing tendency, supported and encouraged by the City, among community groups toward co-operation and collaboration in the delivery of services. This has led to the creation of partnerships offering services and projects across municipal boundaries.
 - The proposed change would allow Council to support such partnerships, while at the same time ensuring that grant funds are reserved for local use only.
3. ***Grants may not be for the purpose of assisting an industrial, commercial or business undertaking.***
 - Existing grants are issued in accordance with Section 176 of the Local Government Act. Section 182 of that Act limits Section 176, and prevents municipalities from offering grant assistance to these sorts of entities. The proposed change would make this clear to potential applicants by incorporating the LGA text.
4. ***The Social Planning Board will review applications in March using the following criteria, and forward its recommendations to Council:***
 - a) *relevance to City of Kelowna social policy;*
 - b) *adherence to the Terms of Reference;*
 - c) *uniqueness of the project;*
 - d) *community need for the project and its expected impact;*
 - e) *level of community support and volunteer involvement;*
 - f) *degree of co-operation with other community service providers;*
 - g) *clarity & measurability of performance targets and timelines;*
 - h) *transparency of agency operations and planning;*
 - i) *evidence of financial need; and,*
 - j) *quality of management, including the satisfactory administration of any previous Grant(s).*
 - Evaluation criteria are specified for the SEY program, but not for the CSD program.
 - The proposed changes would increase the transparency and consistency of the process, facilitate structured and objective application reviews, allow applicants to better understand and anticipate the evaluation process, and provide the basis for a quantifiable assessment tool.
 - Criteria a) – h) reflect existing requirements.
 - Point i) provides a policy basis for the existing Social Planning Board practice of refusing grant funding where there is no financial need. Existing policy includes this as a criterion for Special Project Grants only.
 - Point j) allows the Social Planning Board to consider the applicant's stability and past Grant performance in its evaluation process, and is intended to increase the accountability of Grant recipients. The Social Planning Board was reluctant to deem agencies with incomplete Grants ineligible out of hand.
5. ***Replacing the existing appeals process (policy points 6-9) and with the following:***
 - a) ***Applicants that were interviewed and that were refused funding or had their funding request reduced, may request a re-evaluation of their application if they believe:***
 - i) *they were refused funding despite having met the grant criteria;*
 - ii) *information regarding its application was not properly communicated;*
 - iii) *there was unfairness or bias in the evaluation process; or,*
 - iv) *the amount granted is considerably less than requested, such that the success of the program will be affected.*
 - b) ***Requests for re-evaluation must be received in writing within two weeks of the date of the letter advising of the Council's decision, and will be reviewed by the Social***

Planning Board. The re-evaluation process is not intended as a means for groups to modify unsuccessful proposals, and the Board will not consider any information or proposals that were not a part of the original application.

- c) At its sole discretion, the Board may re-interview the applicant at the Board's second meeting following the receipt of the request and may amend or uphold its original recommendation.***
 - d) Any recommendation for additional funding is subject to the approval of Council..***
 - e) Decisions reached under this clause are final, and no further re-evaluation will be done.***
 - The existing appeals system was established to insulate Council and individual Councillors from the sometimes inappropriate approaches of applicants who are dissatisfied with the grants process or the decisions of Council.
 - Existing language used to describe the existing process is misleading, as the decisions of Council cannot be appealed to a subordinate body.
 - Existing policy does not include the criteria used by the Social Planning Board in recommending changes to previous grant decisions.
 - The time frame for second interviews is specified in order to a) allow Board members sufficient time to familiarize themselves with the re-evaluation request and, b) to ensure that the re-evaluation process is handled expeditiously.
 - The proposed changes are intended to remedy the language problem identified above, and to include the re-evaluation criteria used by the Board to recommend additional funding where merited.
- 6. *Replace existing Policy Point 11 with the following: "Funding will commence once the Letter of Agreement has been received, deemed satisfactory by municipal staff and signed by the Director of Planning and Development Services or the Director's designate".***
- The proposed change makes clear that Letters of Agreement entered into under this program may be signed by designated City staff, rather than the Mayor and City Clerk. This serves to further insulate Council from the day-to-day administration of the program.

SUMMARY:

In order to improve the efficiency, understanding and accountability of the City's Community Social Development Grant program, it is recommended that City Council adopt changes to Policy 218 as described above.

Theresa Eichler, MCIP
Community Planning Manager

Approved for Inclusion



R.L. (Ron) Mattiussi, ACP, MCIP
Director of Planning & Development Services

RJ