



**The Corporation of the City of Stratford  
Municipal Accommodation Tax Ad-Hoc Committee  
AGENDA**

**Date:** February 17, 2026  
**Time:** 3:00 p.m.  
**Location:** Council Chamber, City Hall

To watch the Municipal Accommodation Tax Ad-Hoc Committee meeting live, please click the following link:

<https://stratford-ca.zoom.us/j/87084302729?pwd=oMyEusYBpGhLaXnFnDHBoXWLqk4L9c.1>

A video recording of the meeting will also be available through a link on the City's website

<https://calendar.stratford.ca/meetings> following the meeting.

Pages

**1. Call to Order**

The Chair to call the meeting to Order.

Land Acknowledgement

Moment of Silent Reflection

Respectful Conduct Statement

**2. Declaration of Pecuniary Interest and the General Nature Thereof**

**3. Adoption of the Minutes**

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Motion by

**THAT the Municipal Accommodation Tax Ad-Hoc Committee minutes dated January 19, 2026 be adopted as printed.**

**4. Adoption of the Addendum/Addenda to the Agenda**

Motion by

**THAT the Addendum/Addenda to the Municipal Accommodation Tax Ad-Hoc Committee Agenda dated February 17, 2026, be added to the agenda.**

**5. Items for Discussion**

**5.1 Draft Use of Municipal Accommodation Tax and Reserve Fund Policy** 7 - 31

**5.2 Consultation and Engagement Activities**

**5.3 Next Meeting**

Meetings of the MAT Ad-Hoc Committee may be held on the following dates:

- Monday, March 16, 2026, at 3:00 p.m.; or
- Monday, April 20, 2026, at 3:00 p.m.

**6. Adjournment**

Motion by

**THAT the Municipal Accommodation Tax Ad-Hoc Committee meeting adjourn.**



**The Corporation of the City of Stratford**  
**Municipal Accommodation Tax Ad-Hoc Committee**  
**MINUTES**

Date: January 19, 2026

Time: 3:00 P.M.

Location: Council Chamber, City Hall

Municipal Accommodation Tax Councillor Burbach - Chair, Jennifer Birmingham,  
Ad-Hoc Committee Present: John Hatton, Cameron Ohlman, Nathan Schleicher

Staff Present: Karmen Krueger – Director of Corporate Services,  
Tatiana Dafoe - City Clerk, Victoria Trotter -  
Council Committee Coordinator, Ashley Price –  
Manager of Revenue/Taxation and Deputy  
Treasurer

Also Present: Members of the Public

**1. Call to Order**

The Chair called the meeting to Order at 3:00 p.m.

Land Acknowledgement

Moment of Silent Reflection

Respectful Conduct Statement

**2. Introduction of Members**

Members and staff introduced themselves.

**3. Declaration of Pecuniary Interest and the General Nature Thereof**

John Hatton noted he runs Discover Stratford which has an interest in driving customers to the Stratford Tourism Industry.

**4. Adoption of Addendum**

**Motion By** John Hatton

**THAT the Addendum to the Municipal Accommodation Tax Ad-Hoc Committee Agenda dated January 19, 2026, be added to the agenda as printed.**

**Carried**

**5. Items for Discussion****5.1 Draft Use of Municipal Accommodation Tax and Reserve Fund Policy**

**Discussion:** The Director of Corporate Services noted the draft policy provided with the agenda was started to guide the decision making prior to direction from Council to establish an ad-hoc committee. The draft did not proceed once this direction was provided.

The Committee discussed:

- the importance of determining a strategy to guide the development of the policy;
- the intent of the policy which could be to regenerate the MAT fund, increase overnight stays, or for a broad tourism purpose;
- the expected outcome following the MAT Ad-Hoc Committee's work; and
- support for developing criteria to evaluate applications to use MAT funds for events and projects.

The Committee decided to move forward with the following:

- review of strategic plans including Destination Stratford's tourism plan/strategy, Council's Strategic Priorities and the City's Sports Tourism Strategy and the Community Climate Action Plan;

- obtaining a copy of the Niagara-on-the-Lake MAT Use of Funds Policy for review; and
- the Director of Corporate Services to update the draft Policy based on the discussion and list the policy on the next agenda.

## 5.2 Public Engagement Activities

**Discussion:** Councillor Burbach provided an overview of the resolution of Council from the December 8, 2025 Regular Council meeting which provided direction that the MAT Ad Hoc Committee undertake structured consultation.

**Motion by** Jennifer Birmingham  
**THAT Barb Shaughnessy be heard.**

**Carried**

Barb Shaughnessy spoke to the draft survey noting the following:

- tourism is the most important economic driver in the downtown core;
- the survey not reflecting the direction provided by Council;
- the survey being premature and should be undertaken following preliminary work being completed by the Committee; and
- engagement could include an open house for stakeholders.

The Director of Corporate Services stated the survey questions provided were meant to start a conversation and are not final.

Members of the MAT Ad-Hoc Committee discussed engagement with stakeholders. Highlights of the discussion included:

- engagement process being delayed until the Committee can complete preliminary work;
- the EngageStratford platform being used to push the survey out to stakeholders;

- importance of a question to determine who is taking the survey to separate the final data;
- the City's experience with holding open houses for the annual budget; and
- the survey being used to verify the Committee's review.

## **6. Next Meeting**

The next meeting of the MAT Ad-Hoc Committee will be held on Tuesday, February 17, 2026 at 3:00 p.m. in Council Chambers.

## **7. Adjournment**

**Motion by** John Hatton

**THAT the Municipal Accommodation Tax Ad-Hoc Committee meeting adjourn.**

**Carried**

Meeting Start Time: 3:00 P.M.

Meeting End Time: 5:12 P.M.




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## **The Corporation of the City of Stratford Policy Manual**

<b>Policy Number:</b>	Insert text here
<b>Policy Section:</b>	Insert text here
<b>Department:</b>	Corporate Services
<b>Date Adopted:</b>	Insert text here
<b>Date Amended:</b>	Insert text here
<b>Scheduled for Review:</b>	Insert text here
<b>Date of Last Review:</b>	Insert text here
<b>Policy Type:</b>	Council-adopted Policy

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### **“Use of Municipal Accommodation Tax and Reserve Fund Policy”**

#### **Policy Statement:**

An administrative and financial policy to guide the use of Municipal Accommodation Tax (MAT) collections to grow the City of Stratford’s visitor economy through strategic investments in tourism and destination development that promote single and multiple night durations. It is the intent of this policy to support events that generate tourism visits that have an impact on local businesses, including accommodators, eating establishments and other commercial establishments to ultimately benefit the City’s visitors, residents and business owners.

#### **Purpose:**

This Policy establishes guidelines for the use of the Municipal Portion of funds collected through the City of Stratford’s MAT program. The fundamental goals of this policy are:

- to set the guidelines for monitoring the MAT reserve fund and the distribution of funds available to ensure that revenue collected through the Municipal Portion of the MAT program is directed to support and manage Tourism activities, services, initiatives, and opportunities for residents, businesses, and visitors to the City of Stratford that meets the legislative requirements and strategic priorities established by Council and this policy.

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- to ensure consistency in the evaluation of and strategic investment in community-led projects and programs to promote and grow Stratford's tourism.
- The policy is to be used in conjunction with the guidelines established in the City's Reserve and Reserve Fund Policy which defines sources and uses of funds and authorizes an appropriate target level for the balances in the Reserve Fund.

**Definitions:**

**Act:** shall mean the Municipal Act, 2001, S.O. 2001, c.25.

**Conflict of Interest** Includes: (1) an entity controlled by any member of Council, or employee of the City, or any associate or family member of any member of Council or employee of the City; (2) a situation in which a director, officer, or employee of the entity, or any associate, family member, or entity controlled by any such person, is able to benefit financially from the Tourism Product.

**Council:** shall mean the Council for The Corporation of the City of Stratford.

**Destination Marketing Program:** shall have the meaning given to it in the Ontario Regulation 435/17, as amended.

**Eligible Tourism Entity:** shall have the meaning given to it in the Ontario Regulation 435/17, as amended. This entity in Stratford is currently known as the Stratford Tourism Alliance (STA) or Destination Stratford (DS).

**Municipality or City:** shall mean The Corporation of the City of Stratford.

**Municipal Accommodation Tax or MAT:** shall mean the Transient Accommodation Tax in accordance with Ontario Regulation 435/17 – Transient Accommodation Tax.

**Policy:** shall mean the City of Stratford's "Use of Municipal Accommodation Tax and Reserve Fund" policy.

**Regulation:** shall mean the Ontario Regulation 435/17: Transient Accommodation Tax

**Reserve or Reserve Fund:** shall mean the reserve fund that is established by the City of Stratford for the use of managing funds related to Municipal Accommodation Tax.

**Staff or City Staff:** shall mean the employees of The Corporation of the City of Stratford.

**Tourism Product:** means any product, service, event or offering that is intended to attract visitors.

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**Transient Accommodation Tax:** shall mean a Transient Accommodation Tax implemented pursuant to s. 400.1 of the Municipal Act, 2001, as amended, and any applicable regulations promulgated pursuant to that Act.

**Visitor:** means anyone who visits Stratford from more than 40 kilometers away who is not making a routine trip.

### **Roles and Responsibilities:**

#### **Council:**

- Approve the MAT tax rate through the MAT by-law.
- Establish priorities through the Corporate Strategic Plan.
- Establish priorities through Cultural Plan and Sport Tourism Plan.
- Review and deliberate, operational, and capital investment and enhancements with the MAT reserve fund using the established criteria.

#### **Corporate Leadership Team:**

- Review and submit multi-year budget strategy.
- Maintain a culture of data-driven decision making that is a result of appropriate internal collaboration, alignment to the approved plans of the City, business case option assessment, and risk management.
- Refer capital investments and enhancements within the MAT policy to Council.

#### **STA/DS:**

- Lead Destination Marketing activities in alignment with City's strategic activities.
- Facilitate funding programs to complement the funding programs delivered through the City's Community Services department as outlined in this policy.

#### **Scope:**

#### **Revenue Sharing**

Pursuant to Ontario Regulation 435/17 – Transient Accommodation Tax, 50% of the revenue, net of administration costs, collected through the MAT Program in any given fiscal year will be transferred to STA/DS, subject to the terms and conditions of an agreement entered between the City and STA/DS.

#### **Funding Principles**

Informed by the Corporate Strategic Plan and City's Cultural Plan and Sport Tourism Plans, the MAT and associated reserve fund will be utilized to support strategic investments that prioritize advancing Stratford's reputation and building a must-see visitor destination. Particular emphasis will be given to investments that generate overnight or longer duration stays.

Investments for event attraction, infrastructure enhancement, and placemaking on publicly owned land will be submitted for committee review and recommendation for

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City Council consideration annually for such projects that meet the scoring criteria and that are not already internally identified and accommodated by the annual budget.

Priority will be given to supporting events that score well in the evaluation and if any mandatory criteria is not met, applications will be deemed ineligible.

The intent is to maintain at least 25% of annual MAT funds raised for future use or for Council direction, and maintenance of a target balance of the Reserve of an average annual intake of dollars. For example, a minimum of 25% of each year's MAT revenues to be retained in the Reserve until such time as the minimum target is reached. Council will have discretion as to how much of the MAT may be used in a particular year and towards a particular initiative.

### **Annual Budget**

In addition to applications from third parties, and based on anticipated collections, Staff or Council may also identify eligible expenditures in the below-noted areas that support destination development, destination management, and destination marketing initiatives while also increasing the reserve fund at reasonable annual rates in line with reserve fund target thresholds including:

- **Sport, Event, and Conference Attraction and Servicing** - Engage in opportunities to attract regional, provincial, and national events to Stratford through targeted financial support (see Grants and Funding Programs), attendance at industry events, and expanded group servicing options.
- **Network Development and Education** - Invest in and promote educational and network opportunities to support itinerary development, experience enhancement, and robust partnerships across the Tourism sector. This will include an annual workshop series, destination certification programs, sector roundtables or sharing opportunities, and familiarization tours.
- **Tourism Product Development** - Provide incentives for organizations in the development and enhancement of visitor-oriented products and experiences through targeted financial support (see Grants and Funding Programs) and business engagement programs.
- **Visitor Services Enhancements** - Invest in resources to support visitor information including digital and print material development, physical and digital kiosks, and third-party application development.
- **Wayfinding and Signage** - Invest in wayfinding and signage activities to support navigation within the city and designated areas of attraction with a visitor-focused lens.
- **Placemaking and Infrastructure Enhancement** - Recommend strategic investments in the development of public land and infrastructure as places for

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people through public art, free activities, and installations in partnership with City departments. All projects undertaken by Community Services will align and comply with City policies, procedures, and by-laws.

MAT funds within the Reserve Fund may be utilized in the following manner:

1. Direct Monetary Support (i.e. cash funding to support a one-time project or initiative); and/or
2. In-Kind Contributions based on the provision of City property/facilities, materials or resources (i.e. staff time) to support a program or partnership and may or may not include the provision of cash funds. (Note: The recovery of costs related to property/facilities will be based on Council approved User Fee By-Law.)

**External applicants are not permitted to apply for MAT Funds for a specific initiative and the City's Community Grant Program for the same project or in the same calendar year.**

Applicants who apply to both streams will be disqualified from the MAT Fund for that year.

Subject to compliance with the Agreement between the City and Stratford Tourism Alliance (Destination Stratford), the following are the basic principles that a Tourism initiative or project must meet and demonstrate to be funded through MAT funds.

- to support investment into tourism-related infrastructure to help more effectively manage tourism to the benefit of residents and visitors;
- to support projects and initiatives that result in measurable improvements to City services that enhance and improve the management of tourism and visitor experiences;
- to pursue the goals and implement recommendations as outlined in the City's Sport Tourism Strategies, as amended from time to time;
- to support the creation of tourism product development to bring new and innovative products, experiences, and services to the City of Stratford's tourism market;
- to support the promotion of the City of Stratford as a leading destination for tourism, leisure and business travel with an emphasis on promoting overnight stays;

### **Grants and Funding Programs**

To support tourism-related initiatives, Council may consider funding specific initiatives on an annual basis to make strategic, equitable, and measurable investments in existing

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or new and expansion-driven projects that prioritize and/or demonstrate the following criteria to grow the visitor economy:

- Attracting visitors for overnight, extended stays at local accommodations.
- Strong collaboration among local and regional partners.
- Advancing Downtown attraction efforts.
- Increasing or enhancing sport and event offerings within the city.
- Advancing efforts to promote inclusion, diversity, equity, and accessibility in the Tourism sector.

Any funding programs are contingent on the availability of sufficient MAT revenues.

**Major Events:** An event deemed to have a substantial visitor, economic, and reputational impact on Stratford may be given specific consideration. All event applications must be submitted a minimum of 180 days prior to the start of the event. An event must meet the following additional criteria:

- Open to the public, accessible, and welcoming.
- Ability to reach audiences nationally or internationally.
- Generates an audience minimum of 1,000 in-person attendees and participants that are reasonably expected to utilize local accommodations and eating establishments.
- A demonstrated visitor (40km or further) audience of 50 per cent or more.
- Generates a minimum 50 room/nights at accommodations collecting the MAT in Stratford during the duration of the festival or event.
- Increases the reputation of Stratford through significant media coverage and economic benefits.
- Financially sustainable and does not rely on requested funding solely for event success.
- The event must have been in operation for at least two years and be able to demonstrate the attendance and accommodation data noted above.

### **Program Eligibility**

Eligible events include but are not limited to:

- Professional conferences hosted in Stratford.
- Significant sporting events hosted in Stratford.
- Travelling events hosted in Stratford.
- Travelling festivals hosted in Stratford.
- Professional industry events hosted in Stratford.

***Major events will be evaluated on a case-by-case basis.***

Note: Meeting the criteria above is a minimum threshold for being considered a major event and as a result, not all events that meet the criteria are guaranteed funding.

### **Grants and Funding Program Evaluation and Awards**

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### **Evaluation and Assessment**

Evaluation of applications must align with the expectations of the program and address the below categories:

- Partnership and collaboration
- Project alignment with priority objectives
- Visitor attraction
- Economic impact
- Innovative or unique offering
- Ability to measure
- Feasibility

The goal is to fund projects that demonstrate strong alignment with the objectives of the outlined funding programs, the expected outcomes of each program, and significant collaboration within Stratford's tourism sector. Priority will be given to projects that can demonstrate impact on overnight, extended stays at local accommodations and an audience comprised of at least 20 per cent visitors.

### **Agreement**

Successful applicants will be required to enter into a written agreement with the City to be eligible for funding.

### **Reporting Requirements**

Successful applicants who receive funding from the program must report on how the funding was spent and the impact the funding achieved. The timeline for reporting will be provided upon notice of a successful application and may be required to receive 100 per cent of the awarded funding.

If the recipient fails to fully complete and submit the report to the City within the stated time, the organization will not be eligible for future funding until such a time that the City is satisfied that the report has been submitted in full.

### **Awards**

For general funding applications, 50 per cent of the funds will be provided upon receipt of the award. The remaining 50 per cent will be provided upon receipt of the final report.

For Major Events, 100 per cent of the funds will be provided no sooner than 30 days preceding the event unless otherwise stipulated in any agreement with the recipient.

### **Procedure and Process**

1. Organizations are advised to read the full Use of Municipal Accommodation Tax Policy that will be available through [www.stratford.ca](http://www.stratford.ca).
2. All applicant organizations must complete the application form in full which means that each question must be answered and all the requested supporting documentation

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must be submitted in alignment with associated program documentation. This may include, but is not limited to, project implementation plan, a budget breakdown, and/or communications plan.

3. The application form will be online but alternative formats will be made available upon request. Incomplete applications will not be considered. The City reserves the right to contact any organization for information which requires clarification but will not assume responsibility for incomplete applications.
4. Applications must be received by the City on or before 4:00 p.m. on the advertised submission deadline. No late applications will be considered. It is the sole responsibility of the applicant to ensure that the City receives completed applications. An email notice will be sent to the applicant on completion of the application.
5. Eligible organizations can submit only one (1) complete application per year per so long as they meet eligibility requirements and objectives of the program as outlined.
6. Council will approve any funding allocations.
10. Recommendations for award will be provided to the Deputy Chief Administrative Officer of Public Services for approval.
11. All applicants will receive notification via e-mail on whether their application was successful.
12. Applicants must enter into a written agreement with the City with terms and conditions of funding.
13. Following annual Council budget approval, the Finance Department will issue cheques for successful applicants as outlined in the Application Guide for each program.
14. There is no appeals process for any unsuccessful applications.

15. All cheques must be cashed within three (3) months of the date of issue. Cheques that are not cashed within three (3) months of the date of issue will be cancelled, stopped and will not be replaced. Failure to cash cheques may impact the review of an organization's future grant applications.

**Policy Review**

The MAT Policy will be reviewed every five years by City staff led by the Corporate Services division.

**Terms and Conditions of Awards**

1. Successful recipients of MAT funds will be subjected to terms and conditions relating to the award. All applicants will be expected to acknowledge their agreement to be bound by the following terms and conditions at the time of application. Applicants must, at the City's sole discretion, comply with all

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applicable laws, legislation, regulations, and by-laws consistent with the City's corporate values, image and strategic goals.

2. Confirmation of the recipient that the information contained in the supporting documentation is true and correct in every respect.
3. Confirmation that the recipient does not have a conflict of interest.
4. Confirmation that the funds shall be used by the recipient for the activities set out in the Application.
5. The recipient shall immediately notify the City if the funds cannot be used for the approved activities, or if all or part of the funds has not been spent after completion of the activities. The City may, at its sole discretion, permit the recipient to use the remaining funds for a different, related purpose, or may require their immediate return.
6. The recipient shall comply with all laws, regulations, by-laws and other governmental directives or orders in the course of spending the funds.
7. The recipient shall indemnify and hold harmless the City against any claims, costs, causes of action, fines, or any other losses or other penalties the City suffers relating to the giving of the funds to the recipient.
8. The recipient shall notify the City immediately, in writing, of its impending or actual bankruptcy, insolvency, appointment of a receiver, dissolution, or cessation of carrying on business or bulk sale of assets.
9. The recipient shall acknowledge the financial support of the City in all publicity material related to the services and the funds.
10. The recipient shall immediately notify the City, in writing, if any of the information provided by the recipient to the City is determined to be inaccurate in any material respect, or if there has been any material adverse change in any of the information provided.
11. The recipient must comply with all the reporting requirements as outlined in the Policy herein.
12. The recipient consents to the City using information regarding the details of the funds provided, including the name of the recipient, the activities carried out, and the community and economic impact of the activities in reports and on the City's website and other relevant media, provided that the City shall not release any information, including financial information and personal information of the organization, which is confidential pursuant to the provisions of the Municipal Freedom of Information and Protection of Privacy Act.

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### **Ineligible Initiatives**

Programs, projects or initiatives that are considered part of the City of Stratford's core business unrelated to tourism or economic development shall not receive funding through the MAT Reserve Fund without prior authorization by Council that the funds may be used for a non-tourism-related purpose. Examples of these are:

- a) Salaries Wages and Benefits (except for costs related to In-Kind Contributions as detailed above)
- b) Operating Costs of Public Works Road Maintenance and Repair
- c) Operating Costs of Existing Municipal Facilities

### **Procedure:**

### **Reserve Fund**

The Municipal Accommodation Tax Reserve Fund shall be established under the Reserve and Reserve Fund Policy, to which the Municipal Portion of MAT revenue collected shall be deposited. This revenue shall be dispersed at the discretion of Council based on the funding principles of this policy. Interest income earned on the unused actual cash balance within the Reserve Fund is to be held in the Reserve.

### **Legislative Authority:**

- Municipal Act, 2001
- Ontario Regulation 435/17 – Transient Accommodation Tax

### **Related Documents:**

- F.1.13 Reserve and Reserve Fund Policy
- Evaluation Criteria

### Evaluation Criteria DRAFT FOR DISCUSSION:

Criteria	Sub-Criteria	Evaluation	Weighting
Clear Benefit to Tourism	Benefits to one or more sectors of Tourism with particular emphasis on overnight accommodation	Pass/Fail	Mandatory
Alignment with existing/planned City Plans	Alignment with at least 1 pillar of the <b>City Strategic Plan</b>	Points	2
	Alignment with at least 1 pillar of the <b>Tourism Strategy</b>	Points	2
	Some level of alignment with the City's <b>Climate Change Action Plan</b>	Points	2
	Accessibility	Points	2
Other Expected Benefits	Identification of other groups who will receive benefit	Points	2
Realistic Cost Evaluation	Evidence that costs are realistic and controls in place to manage growth/expansion	Points	5
Ownership	Clearly accountable Individual or Organization to <b>Develop</b> the proposal	Pass/Fail	Mandatory
	Clearly accountable Individual or Organization to <b>Implement</b> the proposal	Pass/Fail	Mandatory
	Clearly accountable Individual or Organization to <b>Operate</b> the proposal	Pass/Fail	Mandatory
Alignment with other	Alignment with other initiatives that would amplify the outcome	Points	
Discrete Work	Is the initiative a unique piece of work or does it depend on other initiatives	Yes/No	High
Realistic Timeline	Is there a clear and realistic timeline of less than 1 year from start to completion?	Pass/Fail	Mandatory
Benefits	Cost & Benefit Analysis (Return on Investment)	Ranking (1-5)	High
	Benefits to Tourism Industry	Ranking (1-5)	Medium
	Benefits to Residents of the	Ranking (1-5)	Medium

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Commented [KK1]: Pass/Fail is okay however, a numerical scoring may be a bit easier to conclude in the case of competing priorities-Perhaps get a score of 5 for each sector?

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Criteria	Sub-Criteria	Evaluation	Weighting
	City		
Synergies	Integration with Existing Projects	Ranking (1-5)	High
	Resource Sharing Potential	Ranking (1-5)	Medium
	Collaborative Opportunities	Ranking (1-5)	Low
	Enhancement of Existing Services	Ranking (1-5)	Medium
Risk Assessment	Cost of Implementation	Ranking (1-5)	Mandatory
	Achievement of Goals	Ranking (1-5)	Medium
	Dependencies	Ranking (1-5)	Medium
Ownership	Clearly Accountable Individual or Organization to <b>Develop</b> the proposal	Pass/Fail	Mandatory

**Commented [KK1]:** Pass/Fail is okay however, a numerical scoring may be a bit easier to conclude in the case of competing priorities-Perhaps get a score of 5 for each sector?

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### Intake Process Highlights

- o Proposals would be submitted through a centralized point, reviewed initially by a team of Staff, with recommendations provided to the Finance & Labour Relations Sub-committee and/or Council as needed.
- o Senior Staff or Council Members must endorse proposals to ensure legitimacy.

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## Summary MAT Funding Criteria Report

### Appendix A – Criteria DRAFT NEEDS REFORMATTING TO MATCH ABOVE CRITERIA

Criteria	Sub-Criteria	Evaluation	Weighting	Notes:
Alignment with existing/planned Town Plan	This set of criteria ensures that the funding request aligns with the Town's broader goals and plans that are already in place.			
	Town Strategic Plan	Pass/Fail	Mandatory	Mandatory alignment with at least 1 pillar of the Corporate Strategy, ideally multiple pillars.
	Town Tourism Strategy (when enacted)	Pass/Fail	Mandatory	Mandatory alignment with at least 1 pillar of the Tourism Strategy, ideally multiple pillars.
Criteria	Sub-Criteria	Evaluation	Weighting	Notes:
	Town Climate Change Action Plan	Pass/Fail	Important, not mandatory	<p>At least some level of alignment is important.</p> <p>If a proposal aligns well with the CCAP, this should be seen as a benefit and should earn additional “points” towards its review/success.</p>

**Commented [KK2]:** This wasn't easily editable, so left the general format, noting that this whole section will require reformatting and wording changes to match the criteria summary noted above.

### Summary MAT Funding Criteria Report

Criteria	Sub-Criteria	Evaluation	Weighting	Notes:
Alignment with other Initiatives	Reviewing the funding request to understand if/how it may align with other items that are either in place today or are expected to be in place in the near term.			
	Is there alignment with other initiatives that would amplify the effect/outcome of either initiative?	Yes/No	High	<p>While not mandatory, if there are other possible projects that have been completed, or are in the process of being completed, that this project can align with and/or amplify, this should be considered a benefit.</p> <p>If there are no other initiatives that this item aligns with, this does not disqualify the funding request, but will not be seen as beneficial as those that do align with others.</p>

## Summary MAT Funding Criteria Report

### Appendix A – Criteria

Criteria	Sub-Criteria	Evaluation	Weighting	Notes:
	Benefit to Tourism Industry	Ranking (1-5)	Medium	<p>Understanding that the tourism industry has multiple sub-components, there are two methods which can be considered for scoring points:</p> <ol style="list-style-type: none"> <li>1. The more aspects of the tourism industry that will receive benefits, as well as the expected impact of the benefit, the higher the proposal ranks.</li> <li>2. Separate point systems for each potential sub-group, which are then added and averaged to give the overall ranking for this sub-criteria.</li> </ol>
	Benefit to Residents of the Town	Ranking (1-5)	Medium	<p>Recognizing that residents should receive <i>some</i> benefit, and there should be no negative impact to residents, this should be scored based on the level of benefit expected.</p> <p>If negative impacts are expected, this should call into consideration the proposal altogether and/or precipitate the negotiation of the proposal.</p> <p>Higher ranking funding requests should have multiple clearly defined benefits for residents of the Town.</p>

## Summary MAT Funding Criteria Report

Criteria	Sub-Criteria	Evaluation	Weighting	Notes:
<b>Benefits</b>	<p>This section contemplates the overarching benefits that the funding request is proposing to offer to various stakeholders, including the Town, the local tourism sector, and residents. While no criteria presented is marked as "Mandatory", if items are absent or poorly presented, consideration should be given to the need for further edits, negotiation, or if the request should be dismissed. However, given the competition manner of the Major Stream, it is expected that those funding requests that are lacking in detail or benefits will score lower than others, and will likely be unsuccessful in their funding request.</p>			
	Cost & Benefit Analysis (ROI)	Ranking (1-5)	High	<p>Does the estimated cost of the project outweigh the expected benefits to be enjoyed by the Town.</p> <p>Higher ranking funding requests should provide a clear cost and benefit analysis, outlining cost drivers, having relatively accurate costs identified, and having benefits defined at multiple levels (tourism industry, Town, residents, experiences, environment, etc.). Those funding requests that are missing this information should rank low (i.e., 1).</p> <p>NOTE: This suggests that proposals should have, at a minimum, an estimated cost (with assumptions to validate/justify costs), as well as expected benefits to various stakeholders (tourists, industry [including potential sub-strata of the industry], residents). Costs can be further reviewed/estimated during the staff-level review of a funding proposal.</p>

## Summary MAT Funding Criteria Report

Criteria	Sub-Criteria	Evaluation	Weighting	Notes:
Discrete work	<p>While the above criteria evaluates if there are opportunities to align with other initiatives, this section evaluates if the work is its own unique item, or if it is a broader suite of activities. While not mandatory, this can help to identify if this funding request should be grouped with others for a larger impact and/or if the funding request is being placed in this funding request in a potentially inappropriate manner (i.e., breaking up a competition-level request into smaller chunks to receive a less stringent review).</p>			
	<p>Is the initiative its own unique piece of work, or does it depend on other initiatives?</p>	Yes/No	High	<p>While not mandatory, if a funding request is dependent upon other tourism activities for its successful completion/implementation, this should be considered by the Town. For example, if the request relies on a regularly occurring event (e.g., assuming that bicycle tours of the wineries/the Town continue), this can be seen as a minor point.</p> <p>However, if the request relies on other possible initiatives being approved or major capital investment by the Town in other possible activities, this should be considered and may negatively impact the evaluation of the request.</p>

### Summary MAT Funding Criteria Report

Criteria	Sub-Criteria	Evaluation	Weighting	Notes:
	Achievement of Goals	Ranking (1-5)	Medium	<p>Is there a clear and realistic manner in which the proposed goals/outcomes of the funding request will be realized? Are the proposed benefits/outcomes aligned with realistic expectations, or are there large assumptions made that distort the realistic outcomes/goals.</p> <p>Funding requests with clear, realistic and achievable goals will score higher than those funding requests that exaggerate their likely outcomes.</p>
	Dependencies	Ranking (1-5)	Medium	<p>What dependencies are required to ensure that the project is successfully completed by the Town?</p> <p>Projects with less dependencies will score higher compared to those with more dependencies, as it will indicate the ability for a project/activity to be completed in a discrete, structured manner.</p> <p>Consideration will be given to identify if there are dependencies that are required to achieve broader impacts or outcomes.</p> <p>Care should be given to not misconstrue a <i>collaboration opportunity</i> with a required dependency for success.</p>

### Summary MAT Funding Criteria Report

Criteria	Sub-Criteria	Evaluation	Weighting	Notes:
<b>Synergies</b>	This section reviews the full suite of potential synergies that funding requests may achieve if approved and implemented. These are not considered mandatory but are seen as important considerations that can improve the effectiveness of the proposed solution.			
	Integration with Existing Projects	Ranking (1-5)	High	If the project dovetails with or builds on an existing project, the project will receive a higher score, as it can have greater impacts than a standalone project or task.
	Resource Sharing Potential	Ranking (1-5)	Medium	If the execution of the project can allow for a sharing of resources with other ongoing projects, reducing the need for hiring exclusive resources, this will be seen as a benefit and will score higher than projects with unique needs.
	Collaborative Opportunities	Ranking (1-5)	Low	Identifying opportunities where the project – either once completed or while in progress – can either enhance existing tourism activities, or it can create future opportunities for collaboration to result in a bigger tourism impact for NOTL.
	Enhancement of Existing Services	Ranking (1-5)	Medium	Does the project, once complete, further enhance the offerings of existing services in the Town? Does this negatively impact the tourism or day-to-day services for Town residents?

## Summary MAT Funding Criteria Report

### Appendix A – Criteria

Criteria	Sub-Criteria	Evaluation	Weighting	Notes:
Realistic cost evaluation	<p>Evaluating the cost of the funding request, ensuring that it is in the appropriate evaluation stream, and that the estimates itself are realistic and will not continue to grow/expand due to a lack of controls in place.</p> <p>Evidence that the proposed cost is realistic and that there are controls to manage growth/expansion.</p>	Pass/Fail	Mandatory	<p>All funding proposals must be submitted with a realistic cost estimate. This should include an overview of the major cost drivers, rough cost breakdowns (e.g., materials costs, reasonable estimate at labour costs, etc.)</p> <p>If the funding request does not provide a cost estimate, it should be rejected as it is unclear if it will belong in the appropriate evaluation stream.</p> <p>If, in the eyes of the Town, the funding request does not have a realistic cost estimate, or if additional detail is required, the Town may choose to either reject the funding request, or it can elect to negotiate with the proponent to receive additional information prior to making a final decision.</p>

## Summary MAT Funding Criteria Report

### Appendix A – Criteria

Criteria	Sub-Criteria	Evaluation	Weighting	Notes:
<b>Ownership</b>	<p>This set of criteria are designed to ensure that the funding request has thought through the ownership of the proposed activity/item/solution from all necessary stages – development, implementation, and ongoing operations. The need for clear ownership is considered mandatory, and if these are not provided, the Town can determine if further negotiation is appropriate, or if the request should be dismissed outright, allowing the proponent to resubmit at a later date, to be considered in a future round of competition.</p>			
	Development: Clearly Accountable Individual or Organization	Pass/Fail	Mandatory	Is there a clear individual or group who will own the development of the proposed item/solution/activity?
	Implementation: Clear Accountable Individual or Organization	Pass/Fail	Mandatory	Is there a clear individual or group who will own the implementation activities, ensuring the idea is successfully implemented?
	Ongoing Operations: Clear Accountable Individual or Organization	Pass/Fail	Mandatory	<p>Is there a clear individual or group who will own the ongoing operations of the request.</p> <p>Note: if the request does not require any ongoing operations (e.g., it is implemented and then requires no ongoing maintenance, support, or review) this is not seen as required).</p>

### Summary MAT Funding Criteria Report

Criteria	Sub-Criteria	Evaluation	Weighting	Notes:
Risk Assessment	<p>This set of criteria are designed to understand the level of risk the proposed funding request will require the Town to incur. These explore items related to cost of the solution, the likelihood that the expected benefits can be achieved, and the reliance of the request on other initiatives and/or activities.</p>			
	Cost of Implementation	Ranking (1-5)	Mandatory	<p><i>Separate from ROI.</i></p> <p>Understanding the cost of the project and determining if the cost is commensurate with what would be seen as reasonable and expected. Understanding the cost drivers and, to a degree of certainty, the actual costs expected in implementation and ongoing operation of the proposed funding request.</p> <p>Those projects that have a lower implementation cost, as well as those that have greater detail in the costs presented, should score higher.</p>

## Summary MAT Funding Criteria Report

### Appendix A – Criteria

Criteria	Sub-Criteria	Evaluation	Weighting	Notes:
Realistic Timeline	<p>Evaluating if the funding request can realistically be completed in within a calendar year, which would limit risk to the Town.</p> <p>Is there a clear and realistic timeline of less than 1 year from start to completion?</p>	Pass/Fail	Mandatory	<p>Funding requests should not require multiple calendar years to be completed, as this increases risk for cost overruns and/or negative impacts to ownership and the achievement of the request goals.</p> <p>Consideration should be given to those funding requests that are multi-phased (i.e., creation/implementation/ongoing operations). If ongoing operations are expected to extend beyond a calendar year (e.g., in perpetuity), this should not be viewed negatively.</p>

# Stratford Municipal Accommodation Tax – Scorecard

Maximum Score: 100 points

## SECTION 1: QUANTITATIVE INPUT (Up to 40 points)

To be completed by applicant. Validity confirmed during review.

Criteria	Considerations	Maximum Points
Economic Tourism Impact	Estimated direct spending by visitors, including accommodations, dining, shopping, and transportation.	10
Visitor Days	Calculated as: # of out-of-town visitors × # of event days.	10
Room Nights	Projected or confirmed overnight stays in local accommodations.	5
Event Economic Impact	Use of standardized tools or formulas to project total economic benefit to Stratford.	5
Alignment with Tourism Development Goals	Supports tourism priorities: outdoor recreation, nature-based tourism, arts & culture, or tourism business development.	5
Not-for-Profit or Collaborative Project	Led by or in partnership with a registered not-for-profit, local business collaboration.	5

## SECTION 2: QUALITATIVE INPUT (Up to 60 points)

Scored by the (insert name/organization which is to be determined)

Criteria	Considerations	Maximum Points
Cultural/Sport Tourism Plan	Strength and clarity of the strategy to attract out-of-town visitors, including digital marketing, partnerships, and media outreach.	10
Media Exposure Potential	Ability to attract media attention (earned media), influencers, tourism publications, and social engagement.	5
Seasonality and Timing	Event occurs in the shoulder season (fall, winter, spring) or strategically activates weekdays or low-traffic periods.	10
Uniqueness and Appeal	Event's originality, theme, or features that distinguish it from other offerings in the region.	5
Community + Business Impact	Involves or benefits local businesses (e.g., restaurants, shops, transportation) and enhances visitor exploration of the broader community.	10

Environmental and Social Contribution	Incorporates sustainability, accessibility, inclusion, Indigenous partnerships, or charitable components.	5
Future Growth and Legacy Potential	Demonstrates potential to grow year-over-year, stay locally grounded, build volunteerism, or support infrastructure improvements.	5
Financial Viability & Leverage	Clear budget, diverse funding sources, realistic financial plan, and demonstrated need for support.	10

TOTAL: /100

Instructions for Committee Use:

Each event is evaluated using both quantitative data provided by the applicant and qualitative data judgement from Committee members.

Applications must reach a minimum threshold score (example 70) to be considered for funding, with final approvals subject to budget availability and fund priorities.