



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

Date: April 7, 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/88481512348?pwd=hlqG0btMhWbOnrg11xPyWovLHLNdVG.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

Motion by

THAT the Municipal Accommodation Tax Ad-Hoc Committee minutes dated February 17, 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 April 7, 2026, be added to the agenda as printed.

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5. Items for Discussion

5.1 Draft Use of Municipal Accommodation Tax Policy 6 - 37

5.2 Engagement and Consultation Activities 38 - 39

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

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

Staff Present: Victoria Trotter - Recording Secretary, Tatiana Dafoe, Karmen Krueger - Director of Corporate Services, Ashley Price - Manager of Revenue and Taxation

Also Present: Members of the Public

1. Call to Order

The Chair called the meeting to Order.

Land Acknowledgement

Moment of Silent Reflection

Respectful Conduct Statement

2. Declaration of Pecuniary Interest and the General Nature Thereof

No disclosures of pecuniary interest were made by a member at the February 17, 2026 Municipal Accommodation Tax Ad-Hoc Committee meeting.

3. Adoption of the Minutes

Moved by Jennifer Birmingham

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

Carried

4. Adoption of the Addendum to the Agenda

Moved by Jennifer Birmingham

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

Carried

5. Items for Discussion

5.1 Draft Use of Municipal Accommodation Tax and Reserve Fund Policy

Discussion: The Director of Corporate Services noted an updated draft policy was provided with the agenda and was based on the direction given by the Committee at the January meeting. Additionally, examples of evaluation criteria have been provided for review by the Committee.

The Committee discussed:

- the importance of a reporting criteria for recipients;
- avoiding rigid thresholds and instead structuring evaluation around scoring/weighting and demonstrated impact;
- the importance in making Municipal Accommodation Tax (MAT) spending more explicitly tied to generating more MAT/overnight visitors;
- noting impact may be better handled as a report-back requirement rather than a strict eligibility gate;
- holding back a portion of funding until reporting is submitted or disqualify from future funding if reporting is not completed;
- including a requirement for applications 6 months/180 days in advance;
- adding points/weighting for events that build shoulder-season demand;

- creating a standing advisory committee to make recommendations to Council and help manage/maintain the scorecard, reducing burden on staff and ensuring industry input.

The Committee decided to move forward with the following:

- the Director of Corporate Services to update the draft policy and evaluation criteria based on the discussion and to list these items on the next agenda.

5.2 Consultation and Engagement Activities

Discussion: The Director of Corporate Services confirmed the Committee is required to use EngageStratford as the platform for a public engagement survey.

The Committee discussed:

- the Committee reviewing the questions of the survey prior to it being made available to the public;
- forwarding the link to the survey to stakeholders such as the Downtown Stratford Business Improvement Area.

The Director of Corporate Services to provide draft survey questions for review at the next meeting.

5.3 Next Meeting

The next meeting of the MAT Ad-Hoc Committee will be held on Monday, March 30, 2026, at 3:00 p.m. in Council Chambers.

In response to questions from the Ad-Hoc Committee the Clerk noted a motion can be made to extend the term of the Committee at the March 30, 2026 meeting.

6. Adjournment

Moved by John Hatton

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

Carried

Meeting Start Time: 3:01 P.M.

Meeting End Time: 5:10 P.M.



DRAFT v4

The Corporation of the City of Stratford Policy Manual

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

“Use of Municipal Accommodation Tax (MAT)” 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 with a focus on increased overnight visits. It is the intent of this Policy to support events and experiences that generate overnight impactful opportunities for the local tourism sector, including accommodators, culinary establishments, retailers, cultural experience providers 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.

- to ensure consistency in the evaluation of and strategic investment in community-led projects and programs to promote and grow Stratford's tourism and visitor economy.
- 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.

Incorporated: shall mean entities incorporated under either federal or provincial legislation. This can include either non-profit or for-profit organizations.

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" 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.

STA/DS: shall mean the Stratford Tourism Alliance operating as Destination Stratford.

Tourism Entity: shall mean a non-profit entity whose mandate includes the promotion of tourism in Ontario or in a municipality and receives a portion of MAT revenue and has entered into a financial accountability agreement with the City for such purpose.

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

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:

Mayor and Council:

- Approve the MAT tax rate established through the MAT by-law.
- Establish priorities through various documents including but not limited to the Corporate Strategic Plan, the Municipal Cultural Plan and Sport Tourism Plan.
- Review and deliberate, operational, and capital investment and enhancements with the MAT reserve fund using the established criteria.
- Budget adoption under Strong Mayor legislation.

Director of Corporate Services/Treasurer

- Oversight of the Financial Accountability Agreement with the not-for-profit entity charged with Destination marketing per Bill 127.

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 that meet the MAT Policy guidelines to Council.

STA/DS:

- Lead Destination Marketing activities in alignment with City's strategic activities and any operating agreements or memorandums of understanding.
- Facilitate funding programs to complement the funding programs delivered through the City's Use of Municipal Accommodation Tax 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 DS, subject to the terms and conditions of an agreement entered between the City and DS.

Funding Principles

Informed by the Corporate Strategic Plan, Municipal Cultural Plan and Sport Tourism Plan, the MAT and associated reserve fund will be utilized to support strategic investments that prioritize advancing Stratford's reputation as 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 review and recommendation for 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 50% of the City's share of annual MAT funds raised for future use and/or at Council's direction, in keeping with Council's strategic objectives. For example, if the City's share of annual MAT revenues average \$300,000, the amount available for this funding program would be \$150,000.

Any unallocated funds may remain in the reserve until a subsequent year and be added to the available MAT revenues for future distribution.

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.
- **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.
- **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 public art, free activities, and installations in partnership with City departments. All projects 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 accessing the Use of MAT Fund for that year.

The following are the basic principles that a Tourism initiative or project must meet and demonstrate to be funded through the Use of MAT Policy.

- initiatives support investment in tourism-related infrastructure to help more effectively manage tourism to the benefit of residents and visitors;
- initiatives support projects and initiatives that result in measurable improvements to City services that enhance and improve the management of tourism and

visitor experiences;

- initiatives pursue the goals and implement recommendations as outlined in the City's Sports Tourism Strategies, as amended from time to time;
- initiatives support the creation of tourism product development to bring new and innovative products, experiences, and services to the City of Stratford's tourism market;
- initiatives 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 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 as outlined in this and the Reserve Fund Policy. Should there be conflicting language between the two policies, the City's Reserve and Reserve Fund Policy shall take precedence over this Policy.

Major Events: An event deemed to have a substantial visitor, economic, and reputational impact on Stratford may be given specific consideration for an increased funding request. 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.
- A demonstrated visitor (40km or further) audience of 25 per cent or more.
- 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.
- Events that have been in operation for at least two years and are able to demonstrate the attendance and accommodation data noted below will be given higher score weighting.
- Those events that generate an audience minimum of 300 in-person attendees and where participants are reasonably expected to utilize local accommodations and eating establishments will be given higher score weighting.
- Those events that generate a minimum longer room/night stay at accommodations collecting the MAT in Stratford during the duration of the festival or event will be given higher score weighting.
- Minimum General Liability Insurance coverage as per City requirements
- A minimum MAT Grant and Funding request of \$2,500 and a maximum of \$25,000 (excluding potential Major Events which can request an amount greater than \$25,000). Note that the funding request cannot exceed 50% of total eligible budgeted expenses.

Program Eligibility

Eligible events include but are not limited to:

- Professional conferences hosted in Stratford.
- Significant sporting events hosted in Stratford.
- Events hosted in Stratford.
- Festivals hosted in Stratford.
- Professional industry events hosted in Stratford.

Applications will be evaluated on a case-by-case basis. Projects deemed major will be subject to more stringent scoring criteria (would need to score

greater than 60 points out of 77) and would typically be requesting \$25,000 or more in funding.

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 deemed major, nor are any projects guaranteed funding.

Grants and Funding Program Evaluation and Awards

Evaluation and Assessment

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

- Alignment with the City's established strategies
- Benefits to stakeholders
- Discrete and Innovative or unique offering
- Synergies demonstrated
- Realistic Cost Evaluation and Value for Money
- Organizer's Ownership/Competencies
- Risk Assessment
- Realistic Timeline

Examples of what could be a successful project or program include, but are not limited to:

- Culinary experiences/tours
- Arts and culture experiences
- Walking tours
- Virtual reality experiences
- Festival or event development
- Shoulder season experiences

- Year-round experiences

Shoulder season is characterized by identifying the highest four accommodation months as reported by the accommodators that report stay information and collect MAT from visitors and looking at the two months on either side of those months. As of this policy date, the highest four accommodation months are July, August, September, and October making the shoulder season months May and June along with November and December.

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 a targeted audience 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. The agreement is intended to ensure that sufficient insurance coverage can be provided, safety plans are considered and various other requirements that mitigate event risk to the City.

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 may not receive 100% of approved funding and 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 any funding applications, 50 per cent of the funds will be provided upon confirmation of approval of the event and applicable documentation being received. The remaining 50 per cent will be provided upon receipt of the final report.

For Major Events, 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.
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 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 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 unless this is otherwise delegated.
7. There is no appeals process for any unsuccessful applications.
8. Electronic Funds Transfer is the preferred method of distributing funds. Any 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. The payee and/or EFT recipient must match the applicant's name.

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 applicable laws, legislation, regulations, and by-laws consistent with the City's

corporate values, image and strategic goals.

2. Attestation by the recipient that the information contained in the application and 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 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.

Ineligible Initiatives and expenditure types

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 ineligible expenditures include, but may not be limited to:

- i. Alcohol purchase, distribution, and licensing
- ii. Awards, prizes, and raffles
- iii. Building and other permits and associated fees
- iv. Donations
- v. Lottery licences
- vi. Operating expenses (i.e. hydro, water, rent, etc.)
- vii. Political organizations or contributions
- viii. Projects that are or have been funded by the City's share of MAT already (i.e. project that Council has already funded through their MAT revenues)
- ix. Regular staffing expenses for businesses or organizations (i.e. offsetting costs of an existing position)
- x. City of Stratford fees or procedures (i.e. special event permits, staff time, etc.)
- xi. Salaries Wages and Benefits (except for costs related to In-Kind Contributions as detailed above)
- xii. Operating Costs of Road Maintenance and Repair
- xiii. Operating Costs of Existing Municipal Facilities

Reserve Fund

The Municipal Accommodation Tax Reserve Fund is established under the Reserve and Reserve Fund Policy, to which the Municipal Portion of MAT revenue collected shall be deposited. Council may disperse funding based on the funding principles of this policy. Interest income earned on the unused actual cash balance within the Reserve Fund is to be accrued and forms part of the Reserve Fund.

Legislative Authority:

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

Related Documents:

- F.1.13 Reserve and Reserve Fund Policy
- Evaluation Criteria
- Use of MAT Application Form
- Use of MAT Reporting Form-TBD

Appendix A: MAT Funding Criteria

The criteria outlined below shall be used to assess any applications submitted under the Use of MAT Policy.

Criteria: Alignment with existing/planned City Plans and Other initiatives

This set of criteria ensures that the funding requests align with the City's broader goals and plans that are already in place.

Sub-Criteria	Considerations	Maximum Points
City's Strategic Plan	Alignment with at least 1 pillar of the Corporate Strategy, ideally multiple pillars.	2
City's Sport Tourism Strategy and/or Municipal Cultural Plan	Alignment with at least 1 pillar of the Sport Tourism Strategy and/or Municipal Cultural Plan, ideally multiple pillars.	2
City Climate Change Action Plan	At least some level of alignment is important. If a proposal aligns well with the CCAP, this should be seen as a benefit and will earn additional points towards its review/success.	2
Is there alignment with other initiatives that would amplify the effect/outcome of either initiative?	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. 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.	2

Criteria: Benefits

This section contemplates the overarching benefits that the funding request is proposing to offer to various stakeholders, including the City, the local tourism sector, including but not limited to accommodation providers, 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 for access to MAT funds, it is expected that those funding requests that are lacking in detail or benefits will score lower than others and may be unsuccessful in their funding request.

Sub-Criteria	Considerations	Maximum Points
Cost-Benefit Analysis (ROI)	<p>Does the estimated cost of the project outweigh the expected benefits to be enjoyed by the City.</p> <p>Larger funding requests (greater than \$25,000) 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, City, residents, experiences, environmental, 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>	10
Benefit to Tourism Industry	Understanding that the tourism industry has multiple sub-components, there are two methods which can be considered for scoring points:	10

	<ol style="list-style-type: none"> 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. 2. Separate point systems for each potential sub-group, which are then added and averaged to give the overall ranking for these sub-criteria 	
Benefit to Residents of the City	<p>Recognizing that residents should receive some 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 City.</p>	5

Criteria: Discrete Work

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 requested in a potentially inappropriate manner (i.e., breaking up a competition-level request into smaller chunks to receive a less stringent review).

Sub-Criteria	Considerations	Maximum Points
Is the initiative its own unique piece of work, or does it depend on other initiatives?	While not mandatory, if a funding request is dependent upon other tourism activities for its successful completion/implementation, this should be considered by the City. For example, if the request relies on a regularly occurring event (e.g., assuming that guided walking tours of the City	5

	<p>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 City in other possible activities, this should be considered and may negatively impact the evaluation of the request.</p>	
Achievement of Goals	<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>	5
Dependencies	<p>What dependencies are required to ensure that the project is successfully completed by the City?</p> <p>Projects with lesser dependencies will score higher compared to those with more dependencies, as it will indicate the ability for a project/activity to be completed 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>	5

Criteria: Synergies

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 project.

Sub-Criteria	Considerations	Maximum Points
Integration with Existing Projects	If the project dovetails with or builds on an existing project, the project will receive a higher score, as it can have greater impact than a standalone project or task.	2
Resource Sharing Potential	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.	2
Collaborative Opportunities	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 Stratford.	2
Enhancement of Existing Services	Does the project, once complete, further enhance the offerings of existing services in the City? Does this negatively impact the tourism or day-to-day services for City residents?	5

Criteria: Realistic Cost Evaluation

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.

Sub-Criteria	Considerations	Maximum Points
Evidence that the proposed cost is realistic and that there are controls to manage growth/expansion.	<p>All funding proposals must be submitted with a realistic fulsome cost estimate. This should include an overview of the major costs 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.</p> <p>If, in the eyes of the City, the funding request does not have a realistic cost estimate, or if additional detail is required, the City 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>	5

Criteria: Ownership

This set of criteria are designed to ensure that the applicant has thought through the ownership of 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 City 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.

Sub-Criteria	Considerations	Maximum Points
Development: Clearly Accountable Individual or Organization	Is there a clear individual or group who will own the development of the proposed item/solution/activity?	2
Implementation: Clear Accountable Individual or Organization	Is there a clear individual or group who will own the implementation activities, ensuring the idea is successfully implemented, marketed and popularized.	2

Ongoing Operations: Clear Accountable Individual or Organization	Is there a clear individual or group who will own the ongoing operations of the request? Note: if the request does not require any ongoing operations (e.g., it is implemented and then requires no going maintenance, support, or review) this is not seen as required.	2
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Criteria: Risk Assessment

This set of criteria are designed to understand the level of risk the proposed funding request will require the City 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.

Sub-Criteria	Considerations	Maximum Points
Cost of Implementation	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. Those projects that have a lower implementation cost, as well as those that have greater detail in the costs presented, should score higher.	5

Criteria: Realistic Timeline

Evaluating if the funding request can realistically be completed within a calendar year, which would limit risk to the City.

Sub-Criteria	Considerations	Maximum Points
Is there a clear and realistic timeline of less	Funding requests should not require multiple calendar years to be completed, as this increases risk for cost overruns	2

<p>than 1 year from start to completion?</p>	<p>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>	
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Total Maximum Points: 77

Total Minimum Score for any project: 45

Total Minimum Score for Major project: 60



Application Form (Draft Content – Form will be web-based/fillable)

2027 Use of Municipal Accommodation Tax (MAT) Fund Application Form

Background:

The Municipal Accommodation Tax Fund supports tourism operators and community organizations in Stratford that aim to enhance the City's reputation through innovative tourism products and initiatives. This fund encourages leveraging industry partnerships to create or enhance visitor experiences, positioning Stratford as a must-see destination.

Eligible applicants, including non-profit, registered charities and for-profit organizations, can receive up to \$25,000, with a 50% matching contribution requirement. Applicants must be Stratford based and in good standing with the City of Stratford. If you received funding in the previous year, please note that your application must be for new and enhanced programming. For more information, please review the applicant guideline found on the website.

- Organization Information (Tell us about your organization)
- Organization Name
- Name of Applicant
- What is your position in the organization?
- Mailing Address, City, Postal Code
- Phone Number
- Email Address
- Website/Social Media

Organization information

- Not-for-profit
- Registered charity

- Business- sole proprietor
- Business- partnership <Do you have a signed business partnership agreement? (Yes, No, N/A)>
- What year was your organization established?
- To qualify for the grant, the organization must be incorporated. Is the organization incorporated?

We recognize that many equity-deserving groups face unique economic challenges. If you or the leadership team at your organization identify with any of the below groups, please consider filling in the following sections which will help staff/the Committee understand and better meet community needs. If your organization does not include members from the identified groups or you do not wish to declare your status, leave the fields blank.

- Women
 - Indigenous People
 - Francophone
 - Youth
 - Persons with disabilities
 - Newcomers to Canada
 - Black communities
 - Racialized communities
 - 2SLGBTQIA+
 - Other
- Did your organization receive Municipal Accommodation Tax (MAT) Funding in any previous year? (Yes/No)
 - If Yes what year did your organization receive MAT funding?
 - What is the name of your project/initiative. What is the anticipated date of the project/initiative?
 - Please provide a detailed description of the project/initiative you want to implement.
 - Which sector does your project/initiative align with the most? (Select up to 3)
 - Arts and culture
 - Festivals and events
 - Food and beverage

- Indoor and outdoor experiences or attractions
 - Sports
 - Specialty visitor focused retail
 - Tours
 - Other
- How is this project/initiative unique within the Stratford area? Is this a new project or initiative for your organization, or an existing one? If it is existing, please specify how many years you have been running it.
 - Please explain how your project/initiative will attract visitors from 40km or more away to Stratford. What marketing strategies will you use to promote the project/initiative and encourage visitor participation?
 - How many jobs and volunteer opportunities will your project/initiative create? Will any of these positions become permanent employment?
 - How many Stratford businesses will be involved in your project? Please list the names of these businesses and describe their roles. This information will help us understand the broader economic impact of your project (e.g., catering, marketing, venues, hotels, etc.).
 - What specific actions are you implementing to support and promote equity, diversity, and inclusion within your organization or project/ initiative ? Please provide detailed examples and explain how these efforts contribute to creating a more inclusive and equitable environment for tourism in Stratford.

Equity, Diversity, and Inclusion (EDI) Definition:

Equity involves ensuring fair treatment, access, opportunity, and advancement for all individuals while striving to identify and eliminate barriers that have prevented the full participation of some groups. Diversity refers to the presence of differences within a given setting, encompassing various dimensions such as race, ethnicity, gender, age, sexual orientation, disability, and more. Inclusion is the practice of creating environments in which any individual or group can be and feel welcomed, respected, supported, and valued to fully participate.

- Upload any supporting files to enhance your answers above (e.g., pictures, planning documents, marketing plans, drawings, partnership agreements etc.)

Priority Objectives

Which priority objectives does your proposed project aim to support?

- Aligns with the City's strategic objectives and plans

- Collaboration with local and regional partners
- A focus on accessibility, diversity, equity, and inclusion
- Attracting visitors for overnight stays at accommodations
- Increased brand awareness for the City of Stratford and the Stratford community
- Advancing Downtown attraction
- Increasing or enhancing sport and event offerings

Please explain how the project aligns with the above objectives, using specific examples to illustrate the projects impact on advancing these strategic objectives.

Partnerships

- Fostering network collaboration is a key priority of the Municipal Accommodation Tax Fund. Do you have local or regional partners or sponsors supporting your project or initiative in Stratford? Please provide the names of these organizations and describe their involvement in your project/initiative.
- One of the primary goals of the Municipal Accommodation Tax Fund is to increase overnight stays at accommodations in Stratford. Please identify any accommodation partners and describe how you will collaborate with them to encourage participants to extend their stay in Stratford.

Measurement and Reporting

- Visitor information helps us understand the economic impact of your event. Please share how you will collect visitor information that can be shared back to the City of Stratford. Please describe your data collection plan below, including what methods you will use, who will be responsible for collecting and managing the data, how you will ensure postal codes are collected and how you plan to use the data to evaluate and share the economic impact of your project.

At minimum, all grantees must attempt to collect postal codes from participants. Other useful metrics include number of visitors, where they travelled from, where they stayed or visited, visitor feedback, and social media analytics. Examples of collection methods include in-person surveys taken by volunteers at the event, sign-in sheets, digital forms, QR codes, and social media insights. How will you collect data like this to tell the story of your project/initiative?

- All grantees must collect visitor information. Failure to provide visitor information in the final report may result in ineligibility for future funding.

We understand that collecting visitor data can be challenging. However, quantitative information is essential to help us tell the story of the Funding Program and demonstrate its economic impact. We ask successful applicants to make a reasonable effort to collect this data—note that not every participant needs to be surveyed.

- I understand that I must attempt to collect visitor information to receive funding under the Municipal Accommodation Tax Funding Program.
- Visitor information collected shall not be identifiable data as defined in the Municipal Freedom of Information and Protection of Privacy Act (MFIPPA)
- I understand that, at minimum, my organization must attempt to collect postal codes from visitors and share this data with the City of Stratford to meet the visitor data requirements of the Municipal Accommodation Tax Funding Program.

Eligibility Requirements

- Is your organization in good financial and legal standing with the City of Stratford? (Yes/No)
- Do you agree to acknowledge the financial contribution from Stratford Tourism in publicity materials related to the project? (Yes/No)
- Please indicate if you are the recipient of any other funding through the City of Stratford (Yes/No).

If yes, it is expected that your application for the Municipal Accommodation Tax Fund Program is a new or enhanced offering that will be appealing to visitors and support their experience. Please ensure you explain in detail how this funding will be used differently from other City funding programs. Please note no applicant is able to use two City grants for the same project.

- Do you agree that your project complies with the Program Exclusions for this funding program as outlined within the Use of Municipal Accommodation Tax (MAT) Policy and with the corresponding application guidelines? (Yes/No)
- Do you agree that the reporting requirements outlined in the application guide will need to be completed by December 31, 2027, and that

documentation to validate any claims or expenses made in the report will be required? A reporting form will be provided. (Yes/No)

Funding Information

- Please enter your funding request (up to \$25,000).
- If the City of Stratford is not able to fully fund your request, what is the minimum amount of funding required to make your proposal a success?

Financial Information

- Please review and update the budget template provided on the website. Please be sure to include your own investments in the project that must total at least 50% of your financial request. Upload the completed document.

Declaration

- I declare that:
 - I have read the Municipal Accommodation Tax Policy;
 - I acknowledge that if my application for funding under the MAT program is successful that I will be required to enter into a financial accountability agreement;
 - I acknowledge that if my application for funding under the MAT program is successful that I will be required to complete and submit reports to the City to receive a portion of the funding awarded;

Application Checklist

- Application online (or accessible alternative format with the support of Corporate Services staff)
- Budget Template
- Reviewed the Use of Municipal Accommodation Tax (MAT) Policy and the Application Guidelines

Attestation

By signing below, I confirm that the information provided in my application is accurate and complete to the best of my knowledge. I understand that providing false or misleading information may result in the disqualification of my application. I acknowledge my application is subject to the terms and conditions laid out in the Use of Municipal Accommodation Tax (MAT) Policy.

Name of Applicant Organization:

Name of Signing Officer:

Signature:

Date:

Notice of Collection

Personal information, as defined by the Municipal Freedom of Information and Protection of Privacy Act (MFIPPA) is collected under the authority of the Municipal Act, 2001, and in accordance with the provisions of MFIPPA. Personal information on this form and the Eligibility Checklist will be used for the purpose of assessing funding applications, making decisions about fund allocations, reporting on statistics about the program, and to send you updates about the program and fund allocations.. If you have questions about this collection; use, and disclosure of this information, contact the City of Stratford's Clerk by phone at 519-271-0250 x 5237 or by email at clerks@stratford.ca.

- Please click submit at the end of this application. If you do not click submit, the City will not receive your application. Thank you for applying!

DRAFT**City of Stratford MAT Funding Budget Template****Part 1:**

- Organization Name:
- Application Year:
- Date(s) of Event:
- Notes: *This is a template. You may edit categories as needed*

Part 2: Revenues

Revenue (all other sources)	Project Budget	Requested Funding Amount
Add revenue description	\$	\$
Add revenue description	\$	\$
Add revenue description	\$	\$
Total Revenues (excluding MAT Fund Request)	\$	\$

Part 3: Expenses

Expenses	Project Budget	Requested Funding Amount
Add expense description	\$	\$
Add expense description	\$	\$
Add expense description	\$	\$
Total Expenses	\$	\$

Part 4: In-kind Requests

In-kind Requests (facility fee discounts or other)	Project Budget	Requested Funding Amount
Add in-kind expense description	\$	\$
Add in-kind expense description	\$	\$
Total In-kind requests	\$	\$

Part 5: Total Project Costs

Totals	Project budget	Requested Funding Amount
Total Project Costs	\$	\$
Total Project Support Requested (includes in-kind request)	\$	\$
Total Funds Required (excludes in-kind request)	\$	\$
Applicant Grant Contribution (50% of Funding Amount)	N/A	\$

Draft Award Letter

RE: Use of Municipal Accommodation Tax (MAT) Funding Award

Dear

The Corporation of the City of Stratford (the "City") is delighted to inform you that your application to the Use of Municipal Accommodation Tax (MAT) Fund has been successful for 2027. We are pleased to offer you an award in the amount of \$XXXXX to support the growth of the tourism economy in Stratford.

The funding of \$XXXXX shall only be used for the purpose of the <<insert approved project>>.

Subject to all funding conditions, the timeline for the release of funds will be as follows:

- 50 per cent of the award, in the amount of \$XXX, will be provided within thirty (30) days of the receipt of this signed letter by the City of Stratford's Finance department.
- The remaining 50 per cent of the award, in the amount of \$XXX, will be provided upon receipt of the final report by City of Stratford's Finance department. Misuse of funds, failure to complete or sufficiently deliver on your project, or failure to provide a complete and timely report will disentitle you from the grant award under the Municipal Accommodation Tax Fund.
- The report is due no later than December 31st, 2027 and the link can be found in the email accompanying this letter.
- To support your reporting and measurement of your project's economic impact to meet reporting expectations of the fund, you will be required to submit a [TREIM](#) (Tourism Regional Economic Impact Model) with your final report.
- You are required to provide proof of a 50% matching contribution to be eligible for the award. Based on your award, you will need to provide a contribution of \$XXXXX to support the project. You can demonstrate how you met this requirement in the report highlighted above.
- To receive the remaining 50% of your funding, you need to have submit your final report. In your final report, you must provide examples of marketing that was completed for your project/ initiative. Examples of marketing activities include social media promotion, geo-targeted advertising, email outreach on your mailing list and partner cross-promotion.

As a grant recipient, you will be bound by the terms and conditions stated in the Use of MAT (Municipal Accommodation Tax) Policy.

To accept the grant outlined in this letter, please sign the acknowledgment and acceptance below and return to the attention of:

Wendy Partridge
Administrative Assistant to the Director of Corporate Services
wpartridge@stratford.ca

By signing below, I agree to the terms and conditions stated in the Use of MAT (Municipal Accommodation Tax) Policy and this attestation letter.

INSERT NAME OF ORGANIZATION

Name:

Title:

Date:

I have the authority to bind the Corporation

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MAT Policy Survey Questions

Stratford City Council has tasked the MAT Ad-Hoc Committee with creating a policy to establish how to allocate funds raised from overnight accommodation taxes. The Ad-Hoc Committee would like your input regarding a proposed application-driven model that would allow event organizers to apply for funding designed to bring tourists to the City, with emphasis on projects/initiatives that lead to overnight stays.

1. How would you describe yourself?
 - Business owner in the City of Stratford (excluding accommodation providers)
 - Accommodation Provider (owner of a Short-term Rental, Bed and Breakfast, Inn, Hotel in the City of Stratford)
 - General Resident of the City of Stratford
 - Visitor/Tourist
 - Other – please specify
2. Are you familiar with the concept of a Municipal Accommodation Tax (MAT)?
 - Yes
 - Somewhat
 - No
3. I believe the City should spend its 50% portion of MAT funds on (select all that apply):
 - Tourism-related events that result in overnight stays
 - Tourism-related events and activities of any kind
 - Placing the amount in a reserve to plan for larger initiatives
 - A combination of all of the above
 - Other – please specify
4. I believe evaluation criteria should be adopted to guide funding decisions by Council:
 - Strongly Agree
 - Agree
 - Neither Agree nor Disagree
 - Disagree
 - Strongly Disagree

5. I believe the policy adopted should provide some flexibility to Council when making funding decisions on the use of MAT funds:
- Strongly Agree
 - Agree
 - Neither Agree nor Disagree
 - Disagree
 - Strongly Disagree
6. The City should take a grants-based approach (like the Community Grants program) annually and fund those projects/programs using MAT funds:
- Strongly Agree
 - Agree
 - Neither Agree nor Disagree
 - Disagree
 - Strongly Disagree
7. Do you have any other comments, suggestions, or questions?

Thank you for taking this survey.