



## 10 Practical Steps to Secure Municipal Funding

Municipalities have long supported community charitable priorities from hospitals, universities, athletic facilities, art galleries to hospices. Capital building projects that meet an important community need are often driven by community organizations, not government. Yet there is a good business case to financial support from your local council. Seeking funding from local government should be a carefully planned mini-campaign with the following 10 steps should guiding your planning and execution.

**Treat your municipalities as you would any leadership donor.** This means do your research, prepare a compelling request for support, build relationships, ask for the right amount and get the right team in place to do the ask.

**Get to know the Mayor, Councillors and Senior Staff.** You need to get to know each councilor and the Mayor. Your councilors will fall into three categories: the obvious champions, those on the fence and those who would not vote in your favour. In your strategy sessions, figure out how to “turn” your nay-sayers into champions. Ask yourself who has the best relationship with each elected official to facilitate one on one meetings and mobilize a team from their ward to call or write to them. And while the vote to support your request will be made by council, you must build a solid relationship with senior staff and be respectful of staff leaders who make the financial recommendations. Consider inviting Council and the CAO to your offices to connect them with your mission.

**If the project is large, commission an economic impact study.** Municipalities make their decisions based on a number of factors – the usage of the services by their residents, the importance of having services close to home, to attract and retain residents, as well as the recruitment of businesses. An economic impact study will tell you how much buying power and economic spin benefit is created.

**Engage the public.** Some charities (and municipalities too) undertake public opinion polling - one hospice had an online vote hosted by the local newspaper – designed to get the issue out but also to gather positive statistics to influence council. Ask your volunteers, staff, donors and friends to write letters of support to council. If your community is onside and in favour, this will influence elected officials.

**Engage the your “family”.** Employees, volunteers, clients and board members are powerful lobbyists and ambassadors on your behalf.

**Set your request amount fairly.** Develop a business-like rationale to support the request amount. This may be based on the percentage of residents accessing services, a flat rate per taxpayer or a percentage of the project cost. Most offer a payment schedule of five years, but longer if the request is very substantial. You must also understand how the municipality will fund the request – general revenues, a special levy, gaming revenues or simply borrowing the money. So in essence, you must understand the financial health of your municipality. As well, when framing your ask break it down into a manageable and appealing amount ie. \$30 per ratepayer per year – this hardly seems as much as \$2.5 million.

**Offer donor recognition.** Most charities are honouring their municipal donors on their donor wall, presenting commemorative plaques to council, inviting council to donor recognition events and hosting a press conference to announce the gift. All of this is to say municipalities are thanked and recognized like all other leadership donors.

**Prepare a thorough request package.** Must haves for your package include a succinct version of your case for support, demographics, usage statistics, client stories and testimonials, justifiable rationale for the requested amount, breakdown of the ask by ratepayer information, data showing how other municipalities have supported hospitals, economic impact data, letters of support and plans for recognizing the municipality's contribution.

**Presenting your request.** First of all, your municipal insiders will help you determine how to move your request through the governance system. Typically, you will make a formal presentation (perhaps not an ask but a cultivation meeting to update council on hospital development plans) prior to the ask. Then you will make a presentation to make the ask to a committee and then if this is endorsed, you will make a presentation at a formal council meeting. In each meeting, be sure to have your CEO, the Board Chair in attendance. As the meetings move along, having more of your staff, board members, volunteers and clients present will send a strong signal of internal support. And of course, the night of the formal "ask" to council you must pack council chambers with your supporters.

**Be mindful of timing.** A few key points to be aware of include the timing of the budgeting process and the timing within the election cycle. In Ontario, elections are every four years with the next round coming up in October 2014. Typically council does not make any major financial decisions that would bind a future council in the last six months of their mandate. Lastly, it is wise not to ask unless you have a good feel that you will get a majority "yes" vote. Once you are in council chambers, your request is public so you must be prepared to deal with the public relations issues that follow – letters to the paper in your favour or not, as well as positive and negative reporting.

Municipal requests can take over a year and up to two years so be patient, understand your municipal process (and politics) and be prepared. It is definitely worth the time!