

FY 2023-24 Budget Note #2: Grant Tracking

Metro provides direct financial support to the region's community-based organizations but has no central technology system to allow staff or Council to easily quantify the amount, timing, or purpose of financial support. Council requests a report from Metro staff detailing the amount of grant funding awarded to regional community-based organizations in fiscal year 2023, desired outcomes of the grant, and grant or project status. The report should include any discounts or subsidies given to CBOs that booked space or gave performances at Metro's venues (P'5, OCC, Expo, and the zoo). Finally, Council requests that the COO explore options for creating a database for tracking grant awards, outcomes, and status for fiscal 2024 and beyond.

Activities to Date

- Staff collaborated across departments to develop a spreadsheet of grants from FY2022-2023 that includes all relevant details requested in the budget note.
- Separately, staff compiled discounts and subsidies to community-based organizations accessing Metro venues.
- Through its existing sponsorship interdepartmental sponsorship process, Metro staff also track sponsorships to community-based organizations, which are limited to one sponsorship per organization, per fiscal year.
- Finance staff identified that most grant information compiled in the spreadsheet (described above) is accessible through PeopleSoft, although some grants were missed using this approach (about 15%). Finance staff believe that improved controls and best practices for PeopleSoft users can eliminate that gap in future fiscal years, providing an easy option for reporting that does not require additional investment.

Future Activities

- Finance staff will work with PeopleSoft users to ensure grant entries are easily returned in search results to improve the speed and accuracy of future annual reports.
- Metro staff will continue to produce grant, sponsorship, and discounts once per year.
- To facilitate information flow to Councilors and Council Office staff, Council Office staff will research and implement a customer relationship management system (CRM), as a limited pilot project. Grant, sponsorship, and discount information will be added to the CRM at least once yearly.

Budget

No budget impacts. Initial reporting completed with existing staff. Future reports and CRM development to be completed with existing staff and budget.