



Event Development Fund

Guidelines

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INTRODUCTION

Kelowna has a long history of hosting events and festivals in sport, culture and entertainment. Events and festivals enhance the quality of life in Kelowna and are an essential element in creating complete communities.

The primary objective of the Event Development Fund is to foster a dynamic event environment in Kelowna through the strategic investment of City of Kelowna resources. In doing so, events will have a positive role in advancing Council's priorities:

- Grow our economy
- Enhance citizen's quality of life
- Focus on results
- Deliver on our plan
- Proactive & pragmatic leadership

The City's investment in a festival or event through this program is motivated by the following values:

- ✓ **Alignment with City of Kelowna community sustainability objectives** reflecting civic commitments to environmental stewardship, healthy active lifestyles, economic vitality and cultural vibrancy
- ✓ **Community Spirit** - through celebration, engagement and participation
- ✓ **Diversity** - being inclusive and welcoming to all members of the community
- ✓ **Excellence** - high quality planning, programming and service delivery
- ✓ **Accountability** - to the City of Kelowna as a funder, to participants and the public
- ✓ **Leadership** - effective and efficient organizations, delivering high quality events which enhance Kelowna's image and profile as a host community

OUTCOMES

To support annual events that make up Kelowna's dynamic culture as well as new events that add to the festive environment, the Event Development Fund was established. Two streams of financial support were created: the City Services Offset Grant, designed to support annual events by providing City services at a reduced rate; and the Strategic event fund, intended to make an impact through procurement of new events or significant development of existing events.

The desired outcomes of the Event Development Fund include the following:

1. Events have broad appeal across demographics
2. Consistent quality throughout events
3. Events are financially and environmentally sustainable
4. Events are supported by the community (volunteers, businesses, residents)
5. The community profile is elevated (national/international recognition)
6. Strong partnerships with aligned efforts are developed and maintained

CITY SERVICES OFFSET GRANT

Total funding available: \$25,000

Minimum grant award: \$200

Maximum grant award: 75 per cent of City service costs to a maximum of \$10,000 for large events (2000+ participants/spectators) and \$3,000 for smaller events (fewer than 2000 participants/spectators)

Description

This grant is provided to offset City-related costs of staging annual, festive outdoor public events on City property. City-related service costs can include, but are not limited to, park rental fees, street-sweeping, utility locates, RCMP and bylaw services, traffic support services, and use of City equipment and staff. Event organizers should recognize that many services are provided by the City at no-cost to the organizer directly such as site preparation and rehabilitation, washroom maintenance and site perimeter garbage and roadway control. This grant applies to the costs that are over and above these services.

Outdoor events face a unique set of challenges requiring a greater scope in planning, infrastructure, budget, public impact, security etc. The intention of the grant is to recognize the value annual events have in building community and lasting legacies and to act as an incentive for event organizers to grow, enhance and improve their event. The grant places the City in a strong facilitative role, encouraging organizers to work with staff in the development of their event.

Examples: single or multi-day events with festival components such as parades, performance stages, merchandising or food service

Grant Objectives

Objectives have been identified to encourage the development of a dynamic and consistently high quality event culture in Kelowna. Success of the City Service Offset Grant program will be measured by the success of events in the areas listed below.

1. Develop sustainable events
2. Collect feedback and adapt
3. Engage the community
4. Establish strong partnerships
5. Enhance experiences
6. Encourage Legacies

Grant Criteria

Applications will be evaluated on the ability to demonstrate the following:

- The clarity of project objectives, outputs, deliverables/outcomes, and distinctiveness
- Alignment of the event objectives with some or all of the City's priorities
- A positive contribution to a number to the grant objectives
- How the funding will improve, enhance and/or grow the event that year
- The ability of the applicant to carry out the project

Eligibility

To be considered for a City Services Offset Grant, events must meet the following criteria:

- Be annual or reoccurring in nature
- Have more than one component (i.e., a race with a musical component)
- Be held outdoors on City property
- Incur City related costs greater than \$270
- Be accessible to the general public (with or without gated admission)
- Take place within Kelowna or must demonstrate that the majority of services for the event and its participants are provided in Kelowna
- Take place within the calendar year of which the grant is approved
- Applicant must be an incorporated non-profit society, active for at least one full year prior to application, or a private business and in good standing with the City of Kelowna. Individuals are not eligible to apply. Charitable status is not required.

This grant is not intended for the following:

- Events where participation is based on fundraising pledges
- Events which have a liquor license capacity (beverage garden) of greater than 500 people (unless the event qualifies for Festival Site Licensing)
- Initiatives which receive other financial or in-kind support from other City of Kelowna sources in excess of 75 per cent of the City related costs. Events which receive other City funding of less than 75 per cent of City related costs are eligible to receive funds from this grant up to a combined total of 75 per cent of the City related costs.
- The first time an event is held in Kelowna
- Events or activities which are politically partisan or primarily focused on commercial activity (tradeshows), education, religion, healthcare, social service or other special interest groups
- Events occurring outside of Kelowna unless the majority of services for the event and its participants are provided in Kelowna
- Expenses related to society/association base operating expenses or deficit management
- Expenses related to damage or loss of City property, garbage removal following the event or any other breaches of permit conditions

Application Process

Following event date and location confirmation with the Outdoor Events Coordinators in November, grant applications will be accepted until March 1 each year. All applications received by this date will be evaluated together and funds distributed accordingly. Applications received after March 1 will be considered if funds are available. Should an event gain eligibility after the event takes place (i.e., the event incurs higher costs surpassing the minimum amount for eligibility), the event can apply for retro-active funding if funds are available. This must be done prior to the completion of the Facility Rental Agreement and damage deposit adjustment.

As part of the grant application, the applicant must provide an estimate of city related costs. Events with minimal changes from the previous year can use the past year's total with a two per cent (2%) increase for inflation. Events which plan to increase or decrease their scope significantly will need to communicate with the Outdoor Events Staff to determine an accurate cost estimate.

Grant applications will be reviewed by staff based on the program criteria and will be forwarded to the Divisional Director of Active Living and Culture for final approval. The grant awarded will not exceed 75 per cent of the total estimated City costs and may be less than 75 per cent due to fund availability and event's alignment with grant criteria. The "Facility Use Agreement" for the event will indicate the grant amount awarded. Upon completion of the event, final costs will be calculated and up to a maximum of 75 per cent of City costs or the approved grant amount

(whichever is less) will be applied to the contract.

Appeals can be made directly to the Divisional Director, Active Living and Culture within 30 days of the funding decision.

Funding terms and conditions

No transfer of funds will occur. Approved grant amount will be tracked through the “Facility Use Agreement” and applied to the final invoice once all costs have been finalized.

Grants will be awarded on an annual basis and will not be guaranteed to any organization for subsequent years. Applicants must clearly demonstrate the event’s capacity for achieving the desired outcomes of the Event Development Fund. Applicants are encouraged to develop a diverse funding/income base and seek self-sufficiency as evidence of a sustainable approach. Applicants may be awarded funds in consecutive years but history of grants received will be taken into consideration.

Applicants already receiving City funding of any kind must note this on their application for consideration. Applicants should also identify other sources of public funding such as grants from other levels of government or regional organizations.

Successful applicants must acknowledge the support of the City of Kelowna in all print and publicity material for the festival or special event (e.g., literature, banners and on-site signs). The City of Kelowna will provide grant recipients with an acknowledgement statement and access to the appropriate materials including logos.

Final Report

Successful applicants will provide a Final Report in the prescribed format to the City of Kelowna within 90 days of completion of the event. The focus of the final report is to determine how well the event met the objectives of the grant and how the City’s support benefits their organization and future event plans. This report provides an opportunity for event assessment and discussion with staff on future plans for improvement. Receipt of the Final Report is a pre-condition for consideration of an applicant’s future grant applications in any funding program offered by the City of Kelowna.

STRATEGIC EVENT FUND

Total funding available: \$25,000

Minimum investment: \$5,000 not to exceed fifty per cent (50%) of event budget

Maximum investment: \$25,000 not to exceed fifty per cent (50%) of event budget

Description:

The intention of the Strategic Event Fund is to support event development and assist in procurement of new large-scale participant based or spectator events. These can either be reoccurring or one-time events. In addition, it is designed to provide support for rejuvenation or expansion to radically improve an existing annual community event. These events tend to have significant operating budgets and deliver a positive impact on community profile, tourism and the local economy.

This fund allows staff to be proactive in seeking events that help create a dynamic environment that aligns with the Event Development Fund objectives and are a good fit for Kelowna. Events by nature are unique and complex. Securing these events often involves a process of discovery, communication and negotiation. This fund gives staff the ability to be flexible and creative in their approach and provides event organizers with a sense of confidence in the City's commitment to supporting events.

This fund can also be applied to revitalize an existing event. This can similarly be a complex and costly process involving strategic planning, engineering, and other technical support.

The program criteria for this fund are intentionally flexible to reflect the fluid and dynamic nature of events. There is no application process for this fund. Instead, the Sport & Event Development team, in partnership with Tourism Kelowna and other stakeholders, will proactively research and identify events that will enhance the event landscape.

Examples: a national or international competition, a national awards celebration, a large multi-day festival featuring international performers, expanding the site of an event, adding additional components to a festival or rebranding an event

Fund Objectives

Objectives have been identified to encourage the development of a dynamic and consistently high quality event culture in Kelowna. Success of the Strategic Event Fund program will be measured by the progress of events in the areas listed below.

1. Creating unique, unforgettable experiences
2. Generating positive exposure for Kelowna
3. Building extensive, long lasting legacies

Fund Criteria

Events will be evaluated on the ability to demonstrate the following:

- Significant advances towards the desired outcomes of the Event Development Fund and the objectives of the Strategic event fund
- Ability of the event to have significant economic impact

- The clarity of project objectives, outputs, deliverables/outcomes, and distinctiveness
- The event organizer's capacity to carry out the project
- Opportunity for community involvement (e.g., volunteers, participants, partnerships)
- Sustainability of event financially, environmentally and operationally

Eligibility

The event must be one of the following:

- New to Kelowna within the last three (3) years
- An existing event which has a significant new aspect to it
- A project/initiative that will greatly enhance an existing event

In addition, the event must also meet the following requirements:

- Have more than one component (i.e., a race with a musical component)
- Be accessible to the general public (with or without gated admission)
- Take place within Kelowna or must demonstrate that the majority of services for the event and its participants are provided in Kelowna
- Event organizer must be an incorporated non-profit society, active for at least one full year prior to funding approval, or a private business and in good standing with the City of Kelowna. Individuals are not eligible. Charitable status is not required.

This fund is not intended for the following:

- Events where participation is based on fundraising pledges
- Initiatives which receive other financial or in-kind support from other City of Kelowna sources for the same purpose
- Events or activities which are politically partisan or primarily focused on commercial activity (tradeshows), education, religion, healthcare, social service, and/or seek to attract a special interest audience
- Expenses related to society/association base operating expenses or deficit management

Approval Process

Event opportunities will be identified through staff, stakeholders, community members, popular culture or otherwise. Events that appear to be a good fit will be researched further. A discovery process will take place involving appropriate staff and community stakeholders such as the Outdoor Events Committee, Tourism Kelowna, Festival's Kelowna and other event organizers.

Financial support of up to \$10,000 can be approved by the Divisional Director, Active Living and Culture; financial support of greater than \$10,000 will be forwarded to Council for consideration.

Funding terms and conditions

Approved funding will be issued in stages at the discretion of the Divisional Director, Active Living and Culture. The payment schedule will be based on achievement of key milestones. The following is an example of an appropriate payment schedule:

- 60 per cent upon approval of funding support
- 20 per cent upon issue of Outdoor Event Permit
- 20 per cent upon successful completion of final report

Events are eligible for funding at any time during the first three years of the event. Funds can only

be accessed once per calendar year by any one event. Annual funding is not guaranteed and is subject to annual review and reporting. One-time events may receive funding commitment in advance pending availability of funds.

Event organizers will be required to acknowledge the support of the City of Kelowna in all print and publicity material for the festival or special event (e.g. literature, banners and on-site signs). The City of Kelowna will provide fund recipients with an acknowledgement statement and access to the appropriate materials including logos.

Funds must be used for the purpose for which they were requested. If the nature of the event changes, the event organizer must notify the City as soon as possible. If the festival or event does not occur, or is significantly delayed, the applicant must notify the City as soon as possible and return all unused funds.

Final Report

Event organizers will provide a Final Report to the City of Kelowna within 90 days of completion of the event. The focus of the final report is to determine how well the event met the objectives of the fund. In the case that a one-time event receives funding in the year(s) prior to the event, a progress report is required annually. Receipt of the Final Report is a pre-condition for events to be considered for any future City funding.