



Active Living & Culture
 Cultural Services Branch – City Hall
 1435 Water Street
 Kelowna, BC V1Y 1J4
 kelowna.ca/culture

GENERAL OPERATING APPLICATION

2019 General Operating Grant Application

Grant Amount requested: \$

New applicant Returning applicant

Organization's Legal Name:	
Address:	
Phone:	Postal Code:

<input type="checkbox"/> Registered Non-Profit Society	Society No. : Date of Incorporation:	<input type="checkbox"/> Registered Charity	Charitable No:
Have you transitioned to the new Societies Act?		Date of Transition:	

Contact Name:	Title:
Phone:	Email:

Alternative Contact (optional):	Title:
Phone:	Email:

Declaration

This declaration is to be signed by two signing officers of your organization.

I certify to the best of my knowledge that the information provided in this application is accurate, complete and endorsed by the group I represent. On behalf of the applicant organization, I agree to the following conditions if this application is successful:

- Grant funds must be applied to current expenses and must not be used to reduce or eliminate accumulated deficits or to retroactively fund activities;
- The organization will make every effort to secure funding from other sources as indicated in its application;
- The organization will maintain proper records and accounts of all revenues and expenditures relating to its activities and, upon the City's request, will make all records and accounts available for inspection by the City or its auditors;
- If there are any changes in the organization's activities as presented in its application, Cultural Services must be notified in writing immediately and approve such changes;
- In the event that the grant funds are not used for the organization's activities as described in the application, they are to be repaid to the City in full. If the activities are completed without requiring the full use of the City funds, the remaining City funds are also to be returned to the City;
- The organization must acknowledge the financial assistance of the City of Kelowna on all communications and promotional materials relating to its activities, such as programmes, brochures, posters, advertisements, websites, news releases and signs. Acknowledgement is provided by using the City of Kelowna logo in accordance with prescribed standards;
- Receipt of a grant does not guarantee funding in the future.

Signature

Title

Name (please print)

Date

Signature

Title

Name (please print)

Date

PROGRAM QUALITY

1. What are your organization's vision, mission and goals? [Evaluation Criteria \(see more\)](#)

(1000 characters maximum)

5. What data and feedback do you collect from your audience/participants to evaluate your programs and services?
Evaluation Criteria (see more)

(500 characters maximum)

6. How have programs and services evolved or changed over time? What influences from the community have motivated that change? Evaluation Criteria (see more)

(750 characters maximum)

7. Please provide support materials [programmes, images or video (emailed or flash drive) that reflect the type and quality of programming created, produced or presented by your organization in the last year. Evaluation Criteria (see more)
8. Provide brief biographies of key artistic and/or cultural leaders involved with your organization (up to 100 words for each biography). Evaluation Criteria (see more)

Name/Title	Description

ORGANIZATIONAL EFFECTIVENESS

9. In consideration of your organizations overall budget, what percentage of total revenue does each source represent? *Evaluation Criteria (see more)*

Source of Revenue	% of total revenue	% of total revenue
	2018	2019
Earned Revenue (All ticket sales, registration fees, memberships, etc...)		
Grants (All federal, provincial, municipal, foundation and gaming grants)		
Donations & Sponsorships (Cash)		
Donations & Sponsorships (In-kind)		

10. How does the organization plan to increase or diversify its funding sources to support its long term goals and strategies? *Evaluation Criteria (see more)*

(500 characters maximum)

11. Attach Financial Statements from the organization’s most recent year-end, including a Balance Sheet. *Evaluation Criteria (see more)*

12. Using the format in the example provided (see below), attach a comparative operating budget that shows:
- Previous year (2017) Actuals
 - Current year (2018) Budget and Actuals to date
 - Proposed (2019) Budget

Explain any line variances of more than 20% between budget years. *Evaluation Criteria (see more)*



2019 Grants Fillable Budget.xlsx

Sample of Comparative Budget:

If this template will not open, please contact Nicole Cantley at ncantley@kelowna.ca.

Non-Profit Organization Comparative Budget Format					
	Previous Year 2016 Actuals	Current Year 2017 Budget	Current Year 2017 Actuals	Next Year 2018 Budget	Notes
REVENUES					
Earned					
Ticket Sales	\$ -	\$ -	\$ -	\$ -	
Workshops	-	-	-	-	
Other programs	-	-	-	-	
Program Sales/Concessions	-	-	-	-	
Venue Rentals	-	-	-	-	
Contract for Services	-	-	-	-	
Government					
City of Kelowna	-	-	-	-	
RDCO	-	-	-	-	
Other Municipality - Specify	-	-	-	-	
Province - Specify	-	-	-	-	
Federal - Specify	-	-	-	-	
Other - Specify	-	-	-	-	
Foundations					
Specify	-	-	-	-	
Fundraising					
Sponsorships	-	-	-	-	
Memberships	-	-	-	-	
Donations - cash	-	-	-	-	
Donations - in-kind	-	-	-	-	
Special Events - specify	-	-	-	-	
Other (specify)	-	-	-	-	
TOTAL REVENUES	\$ -	\$ -	\$ -	\$ -	
EXPENSES					
Programming					
Professional Fees	-	-	-	-	
Other Labour Costs	-	-	-	-	
Venue Costs	-	-	-	-	
Accommodation	-	-	-	-	
Transportation	-	-	-	-	
Other Programming Costs	-	-	-	-	
Equipment/Supplies	-	-	-	-	
Hospitality (Food, Per Diems)	-	-	-	-	
Exhibition Costs	-	-	-	-	
Marketing					
Advertising and Promotion	-	-	-	-	
Printing	-	-	-	-	
Website	-	-	-	-	
Social Media	-	-	-	-	
Fundraising					
Cost of Special Events	-	-	-	-	
Other	-	-	-	-	
Administration					
Salaries/Contractor Fees	-	-	-	-	
Telecommunications	-	-	-	-	
Insurance	-	-	-	-	
Office Space	-	-	-	-	
Office Supplies	-	-	-	-	
Accounting	-	-	-	-	
Board/Meeting Costs	-	-	-	-	
Other (specify)	-	-	-	-	
TOTAL EXPENSES	\$ -	\$ -	\$ -	\$ -	
SURPLUS/(DEFICIT)	\$ -	\$ -	\$ -	\$ -	

13. If you are a returning applicant and are requesting an increase over your last grant amount awarded, please provide a rationale for the increase. [Evaluation Criteria \(see more\)](#)

(500 characters maximum)

--

14. If the organization has a current or projected surplus or deficit, what action is being taken to address or reinvest it? [Evaluation Criteria \(see more\)](#)

(250 characters maximum)

--

15. Describe the 2019 strategic goals of your organization, from your organization's strategic plan. [Evaluation Criteria \(see more\)](#)

Goal 1-
Description:
Goal 2-
Description:
Goal 3-
Description:

16. Attach a list of all current Board Members with names, occupations (or professional affiliations or expertise) and term start/end dates. Evaluation Criteria (see more)

Are there any vacancies on your board? If yes, please describe your recruitment strategies. Evaluation Criteria (see more)

(500 characters maximum)

17. Attach an Organizational Chart that includes Board, staff, and contractors.

If the organization has active committees, please list them and describe their roles. Evaluation Criteria (see more)

(500 characters maximum)

18. Has the organization engaged in board development, strategic planning or specialized training within the past two years? If yes, please describe. Evaluation Criteria (see more)

(500 characters maximum)

19. Who else has a vested interest in what you do? List major partners, collaborators and key stakeholders in your overall operation and provide a brief description of how you work together. (Do not list donors, funders, sponsors or suppliers.) *Evaluation Criteria (see more)*
Note: Use separate page if needed.

Organization, Contact Name and Phone Number	How do you work with this partner? How does collaboration with this partner leverage human or financial resources?

*Please ensure your partners are aware of the content of this application. These organizations may be contacted to confirm participation and level of support.

COMMUNITY ENGAGEMENT & IMPACT

20. Who benefits from your organization’s activities and how do they benefit? *Evaluation Criteria (see more)*
(750 characters maximum)

21. How do you promote, market and build awareness for your programs and services, build appreciation for the work you do and drive participation in the programs and services you provide? [Evaluation Criteria \(see more\)](#)
(750 characters maximum)

22. How does your organization work to ensure that programs and services are accessible and inclusive for anyone who has an interest regardless of age, ability, orientation, ethnic/cultural background, socio-economic status? Please share examples and success stories of inclusivity and diversity within your organization and programming.
[Evaluation Criteria \(see more\)](#)

(750 characters maximum)

Supporting Documents Checklist

- Completed application - Signed original
- Financial Statements - most recent year-end (Q11)
- Organization's Comparative Operating Budget (Q12)
- Organizational Chart including Board, staff, & contractors (see Q17)
- List of all current board members (see Q16)

Electronic copies only:

- Most recently filed BC Ministry of Finance Form 4 (Annual Society Report)
- Organization's Constitution & Bylaws (*only if bylaws have changed*)
- Minutes from the last AGM
- Support materials from the previous year (see Q7)

New applicants must also include:

- Certificate of Incorporation
- Organization's Constitution & Bylaws

If any of the above is missing, your application will be ineligible for adjudication.

Cultural Services staff are available to review your draft application prior to November 16, 2018.

Answer all questions on the form concisely, and include all of the requested supporting materials - use the checklist to ensure that your application is complete.

Applicants will also be able to receive feedback from Cultural Services staff after the grant decisions have been made.

Grant recipients are required to complete a final report in a prescribed format for the City of Kelowna Cultural Services Branch. Receipt of these reports is a precondition for consideration of an organization's future grant applications, in any category. Final Reports for 2019 General Operating grants are due on or before November 1, 2019.

Submission Deadline: Friday, November 30, 2018 at 3:00pm PST

Late applications will not be accepted.

Deliver completed and signed application form along with digital support documents on Flash Drive and other supporting materials by the deadline to:

2019 General Operating Grants
City of Kelowna Cultural Services Branch
City Hall
1435 Water Street
Kelowna, BC V1Y 1J4

HOURS: Monday-Friday 8:00am-4:00pm (closed on Statutory Holidays)

**Applications will be accepted through Canada Post mail provided that they are received prior to the deadline.*

Or email a scanned hard-copy or digitally signed PDF, and required support materials, to:

Christine McWillis
Cultural Services Manager
cmcwillis@kelowna.ca

**If sending via email, please ensure you receive confirmation of submission.*