

2019 Active Living & Culture Grants Project Program Guidelines

Deadline: Friday, November 30, 2018 at 3:00 p.m. PST

These guidelines have been revised for 2019 – previous versions no longer apply.

If you have questions after reviewing these guidelines, you can obtain more information from Cultural Services staff. Please contact staff well in advance of the deadline:

Christine McWillis
Cultural Services Manager
(250) 470-0640
cmcwillis@kelowna.ca

2019 Project Program Grants
City of Kelowna Cultural Services Branch
City Hall
1435 Water Street
Kelowna, BC V1Y 1J4
HOURS: Monday to Friday, 8:00 a.m. to 4:00 p.m.

CITY OF KELOWNA ACTIVE LIVING & CULTURE DIVISION

CORE PRINCIPLES:

The City of Kelowna's Active Living & Culture Division administers a number of grant programs and services for the community which:

- encourage active healthy lifestyles
- build strong neighbourhoods
- nurture lifelong participation in sport
- enhance cultural vibrancy
- facilitate development of events
- enhance social sustainability
- support effective management and operation of sport, recreation and cultural facilities

Organizations seeking funding support from the City of Kelowna through any of the grant programs administered by the Active Living & Culture Division should be aware of and aligned with one or more these core principles.

VALUES:

Any organization supported by the City of Kelowna will commit to the following values:

- accessibility, diversity and inclusion: the organization will not unreasonably exclude anyone by reason of religion, ethnicity, gender, age, sexual orientation, language, income
- accountability and fiscal responsibility: using resources effectively and efficiently
- innovation: being leaders in finding new solutions
- optimizing value: generating more value and impact from existing resources
- partnerships and collaboration: working with others to leverage energy, talent and resources

Cultural Grants – Project Program is one of many grant programs provided by the City of Kelowna. Information about other grant opportunities is available on the City's website:

kelowna.ca/grants

1.0 PROJECT PROGRAM OBJECTIVES AND DESCRIPTION

1.1 Objectives:

This program aims to provide assistance to non-profit organizations which provide festivals, events, or special projects which are publicly accessible, prominently feature arts, culture or heritage and are aligned with the City's cultural vision, principles and goals.

The current objectives for this program include:

Cultural vitality:

- Foster cultural leadership and artistic excellence
- Integrate local heritage as part of cultural vitality
- Enhance cultural vitality at street level: make arts, culture and heritage more visible, particularly in urban centres, neighbourhoods and public spaces
- Increase the number of people who attend and participate in arts, culture and heritage offerings
- Build cultural citizenship and creative fitness: encourage individual expression and participation in arts, culture and heritage activity; youth engagement and arts education; outreach and creativity to reduce barriers to individual expression and participation.

Strengthen the cultural ecosystem:

- Capitalize on culture for tourism and the economy: activities and programs which promote and raise the cultural profile of Kelowna for both residents and visitors; contributing to a robust and dynamic creative economy through professional development and remunerated activity of artists and cultural workers;
- Connect the cultural community; use a collaborative approach to reach across disciplines and sectors to enhance operational effectiveness and delivery of impactful programs in the community.

This program is not intended to be an ongoing source of support and the entrance of new applicants and projects into the program is a key objective. Beginning with the 2017 grant cycle, organizations will be limited to a maximum of three (3) grants from this program for the same project. An organization which has accessed this program three (3) times for the same project, regardless of the years in which support was provided, will no longer be eligible for support ***of that project***.

Applicants are strongly encouraged to ensure that arts, culture or heritage professionals are engaged in the project and compensated for their participation in accordance with sector standards.

1.2 Organization profile:

Organizations participating in this program are Kelowna-based, established, non-profit organizations which have:

- been incorporated and actively providing the majority of their public programs and services in Kelowna for at least one (1) year prior to the application deadline;
- demonstrated an inclusive, diverse and welcoming approach in their operations and activities;
- sound governance and are fiscally responsible, with diverse sources of revenue and good recordkeeping practices;
- organizations need not be from the arts, culture or heritage sector but must, through their application, demonstrate that their festival, event or project has an arts, culture or heritage focus;
- a vision and a feasible plan and budget for the creation and delivery of a festival, event or project which has an arts, culture or heritage focus, has artistic or cultural leadership, and will be accessible and beneficial to Kelowna residents.

1.3 Eligibility:

To participate in this program, the organization must:

- be a registered non-profit society or a registered charity with the Canada Revenue Agency (CRA) and be registered for at least one (1) year at the time of the application deadline;
- be physically located, have an active presence and have the majority of its programs and services delivered within the City of Kelowna for at least one (1) year at the time of the application deadline;
- either solely, or in partnership with others, propose an project which is consistent with the vision, principles, goals and objectives of this program;
- be committed to carrying out its project for the benefit of Kelowna residents without exclusion of anyone by reason of religion, ethnicity, gender, age, sexual orientation, language, disability or income;
- have fulfilled all reporting requirements for any previous grants from the City of Kelowna;
- have other revenue sources for the project;
- have an independent Board of Directors composed of volunteers and representative of its mission and audience. Directors must:
 - Meet the minimum statutory requirements imposed by the relevant incorporation statute (i.e. *BC Societies Act*); and
 - not be remunerated for their services as Director (except for reimbursement of reasonable expenses) nor hold concurrent staff positions.
- submit a project budget;
- provide prepared financial statements for the most recently completed fiscal year.

Cultural facility operators or recipients of General or Professional Operating grants from the City of Kelowna are eligible to apply but must clearly demonstrate that their proposed project

is outside the scope of their annual programs and services which are already supported by the City.

1.4 *Ineligible organizations:*

- publicly funded or private educational institutions (public schools, universities, colleges, training organizations), religious and political groups;
- organizations which have outstanding indebtedness to the City of Kelowna or which have not fulfilled reporting requirements for any previous grants from the City of Kelowna;
- unincorporated committees, groups, collectives or individuals.

1.5 *Eligible activities and expenses:*

1.5.1 *Eligible activities*

- Festival – an organized event which occurs over more than one day, incorporates an intensive level of planned activity into those days, and demonstrates established or potential audience support from a broad range of the community. Must have an arts, culture or heritage focus;
- Event – an organized performance, gathering, activity or cluster of activities which occurs on a single day. Examples include activities which are to be delivered during the annual Culture Days celebration. Must have an arts, culture or heritage focus;
- Project – a special project which may be one-time, with clear start and end dates and identified outcomes. Examples include new or unique collaborations, creation of new work, publications, artist residencies, workshops or conferences, or other time-bound projects which have discrete budgets, plans and sources of support. Must have an arts, culture or heritage focus;
- Art – includes any artistic discipline - Aboriginal arts, community arts, dance, interdisciplinary, literary, media, multidisciplinary, music, theatre, visual arts.
- Heritage – includes events, materials, communications and/or services which interpret and convey the human history of Kelowna and/or foster preservation, stewardship, and public interpretation and appreciation of heritage knowledge, assets, collections and sites;
- Culture – includes public education, programs, events or services focused on awareness, appreciation and celebration of Aboriginal and other ethno-cultural heritage, including language, traditions and artforms.

1.5.2 *Eligible expenses*

Support from this program acknowledges that new projects often need 'seed money' to get started. Grant funds can be used for:

- venue rental and other venue related costs (tents, furniture, audio/visual/lighting and other equipment, technical/trade services)

- material costs relating to design, production/fabrication and installation of new or original works, structures, sets or costumes relating to the project;
- payment of fees and expenses for participating artists and cultural professionals;
- design, production and distribution of original material in any medium which is suitable for a public audience, and does not contain commercial or advertising content (i.e. information brochures, interpretive signage, maps, video). Websites, promotional items (ads, posters, handbills) and directional signage are excluded;
- fees for licenses, permits, insurance and security;
- costs of volunteer recruitment, training and support.

Grants are available for up to 50% of the total project cost, to a maximum of \$10,000. Project grants require matching support from other sources which is equal to or more than the amount provided by the City. Matching contributions may be cash or in kind and must be identified, even if not confirmed, in the application. Projects must be completed by December 31, 2019, unless alternate arrangements are made with City staff.

1.6 *Ineligible activities and expenses:*

1.6.1 Ineligible activities

- projects without a central artistic, cultural or heritage focus;
- projects which do not engage artists and/or cultural workers in a leadership role;
- trade shows or commercial business activity;
- fundraising activities;
- projects which already receive financial or in kind support (including site provision) from other City of Kelowna sources, including City of Kelowna Outdoor Event Offset Grants;
- development of capital proposals or feasibility studies;
- activities focused on sports, politics, education, religion, social service or healthcare.

1.6.2 Ineligible expense

- organization start-up costs or ongoing operating or administration expenses;
- costs of décor, food, beverage and purchased advertising;
- retroactive funding for events which have already occurred;
- deficit reduction;
- bursaries or scholarships;
- construction, renovation, property purchase or major equipment purchases.

2.0 APPLICATION PROCESS

Application forms are available on the [City's website](#).

Organizations considering submission of an application are encouraged to do the following well in advance of the application deadline:

- Review these guidelines
- Contact City staff for more information
 - Christine McWillis, cmcwillis@kelowna.ca, (250) 470-0640
- Attend a grant information workshop in October 2018.
- Prepare a draft application and have it reviewed by City staff or a knowledgeable advisor

Eligible applicants will deliver the application form and required support materials by the program deadline, 3 p.m. PST, Friday, November 30th 2018 to:

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

HOURS: Monday to Friday, 8:00 a.m. to 4:00 p.m.

*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 Service Manager
cmcwillis@kelowna.ca

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

3.0 ASSESSMENT CRITERIA

The criteria listed below and in Schedule 1 represent 'good' practices for project development and delivery. Assessment will be based on the degree to which organizations meet the criteria, based on the information they provide.

All organizations and projects are unique; there is no expectation that an organization must be demonstrating exceptional performance in all areas in order to receive funding support. However, the assessment criteria provide an objective framework within which the project's feasibility and impact can be considered, and form the basis for constructive feedback to the organization.

Criteria are grouped into three (3) categories:

- Quality of Proposed Project (30%) – distinctive or innovative project, qualifications and experience of artistic/cultural leadership, type and depth of arts, culture or heritage features, extent to which project fosters dialogue, learning, reflection, awareness, new perspectives, or celebration of Kelowna's cultural identity and community, alignment with and fulfillment of civic objectives
- Feasibility of Proposed Project (30%) – realistic budget which reflects reasonable revenues and expenses, evidence of community support, diverse revenue sources, planning and management expertise to realize the project, involvement of committed collaborators or partners, a realistic timeline for completion of the project by year end
- Impact of Proposed Project (40%) – anticipated attendance/participation, demographics and reach of anticipated attendance/participation, clearly articulated objectives and outcomes for the project, how the success of the project will be evaluated, potential to attract a non-resident audience, sensitivity to and mitigation of environmental impacts, education/learning opportunities, legacy potential of project

Detailed criteria are listed in Schedule 1 of these Guidelines.

4.0 ASSESSMENT OF APPLICATIONS

4.1 Review Process:

4.1.1 Staff Review:

Introduced in 2017, some applications will be diverted into a streamlined process, as follows:

- (a) all applications from first-time applicants in the Project Program, regardless of the grant amount requested, will be subject to independent evaluation by the Cultural Grant Panel;
- (b) returning applicants requesting a Project Grant of less than \$3500 will be reviewed by Cultural Services staff. The results of the staff review will be forwarded to the Director of the Active Living & Culture Division for final approval;
- (c) all other applicants will be subject to independent evaluation by the Cultural Grant Panel.

4.1.2 Independent Evaluation:

Except as noted in Para 4.1.1, applications in this program are adjudicated by a Cultural Grant Panel of professional qualified peer and community representatives.

Adjudication by panelists is independent and at arms length from the City of Kelowna.

Panelists are selected to participate based on their experience, merit and familiarity with grantmaking practice and the local arts, culture and heritage community. To the extent possible, the panel will reflect the diversity of the community at large and the range of disciplines and activities in the list of applicants.

Panelists who have a real or perceived conflict of interest regarding any application will be required to declare that such a conflict exists and will not participate in decisions relating to that application.

Cultural Services staff will be present as observers during the adjudication process, but will not be active participants.

The Cultural Grant Panel will, within 60 days of the application deadline, provide its recommendations to City staff. The panel's recommendations are final.

4.2 Interview:

Following completion of the review process, applicants may be contacted to discuss the evaluation, build understanding about how the organization will address any concerns arising, and engage in a broader dialogue about the project.

4.3 Notification and Distribution:

Applicants will receive email notification of evaluation results in early February, 2019. Notification will include feedback from the Grant Panel and/or City staff.

Successful applicants will receive a cheque and letter of confirmation detailing any terms and conditions, feedback or follow up items, in February, 2019.

4.4 Request for Clarification/Request for Reconsideration

Applicants who do not agree with a funding notification may request further clarification from staff, or if still in disagreement after clarification, may make a formal request for reconsideration by the Director of the Active Living & Culture Division. In the event of a formal request for reconsideration, the City may delay distribution of some or all of the funds in this program until all of the funding decisions have been resolved.

4.5 Final Report:

Successful applicants will provide a Final Report in a prescribed format to the Cultural Services Branch. Receipt of these reports is a pre-condition for future eligibility in any Cultural Services grant program. Final Reports may also be considered part of assessment of any future applications by the organization.

New to the program in 2018, 1-3 high quality images must be submitted with the Final Report. These images must be accompanied by photo release waivers from both the photographer and people in the photographs, giving the photo to the City of Kelowna and allowing the City to use them in future promotional materials.

Final Reports for 2019 Project Grants must be submitted within 60 days of completion of the project. If the applicant intends to apply for support in 2020, a Final Report for the 2019 project must be provided prior to the 2020 grant deadline.

5.0 TIMELINE

A typical timeline appears in the table below. The timeline is subject to change.

Deadline	Appn Review	Notification	Distribution	Final Report
Nov 30 2018	Jan 2019	Late Jan 2019	By end Feb 2019	Within 60 days of completion or prior to 2019 deadline

6.0 CONDITIONS OF FUNDING

In addition to any specific terms and conditions which may arise from the annual review process, the conditions below will apply to any organization receiving funding from this program:

- 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.

7.0 CONFIDENTIALITY

All documents submitted by applicants to the City become the property of the City. The City will make every effort to maintain the confidentiality of each application and the information contained therein except to the extent necessary to communicate information to staff and assessors for the purposes of evaluation, administration and analysis. General information about the project, including the funded amount and the organization being funded under the program may also be released. The City will not release any additional information to the public except as required under the Province of British Columbia *Freedom of Information and Protection of Privacy Act* or other legal disclosure process.

8.0 CONTACT INFORMATION

Staff: Christine McWillis
Address: 1435 Water Street
Kelowna, BC V1Y 1J4
Phone: (250) 470-0640
Hours: Monday – Friday, 8:00 a.m. to 4:00 p.m.
Email: cmcwillis@kelowna.ca

SCHEDULE 1 – DETAILED ASSESSMENT CRITERIA		
Project Quality 30%	Q1	The project is aligned with program objectives, vision, principles and goals.
	Q2	If the applicant receives operating support from the City of Kelowna, the project is clearly distinct and separate from the applicant's normal programs and services already supported by the City. (eligible/ineligible)
	Q3	The project has a central arts, culture or heritage focus which is clearly articulated.
	Q4	The project is a unique or distinctive addition to Kelowna's cultural identity and community.
	Q5	The project provides for public engagement.
	Q6	There is qualified artistic and/or cultural leadership for the project that is appropriately engaged and compensated.
Project Feasibility 30%	Q7	There is a realistic and achievable timeline for completion of the project by the end of 2019.
	Q8	The organization has leveraged its human and financial resources by actively collaborating with other organizations to deliver the project.
	Q9	The applicant has strategies in place to create awareness of, build appreciation for and drive participation in the project.
	Q10	The project budget reflects a reasonable balance between administrative and production costs for the project.
	Q10/Q13	The proposed use of grant funds is consistent with the program objectives and description.
	Q11	The project budget reflects diverse sources of revenue, including earned revenue and community support.
	Q11/12	Matching requirements of the program have been met. (eligible/ineligible)
	Q14/15	There is evidence of demand, need or a new audience for the project.
Project Impact 40%	Q16	The project is impactful and creates benefits to the community at large.
	Q17	The applicant has identified strategies to eliminate barriers for underserved audiences to participate in the project.
	Q18	The project has potential for cultural tourism and strategies to engage visitors.
	Q19	The project considers environmental impacts and strategies for mitigation.