

Active Living & Culture Grants Organization Development Guidelines

Open Intake – applications can be submitted at any time.

These guidelines have been revised in October 2020 – previous versions no longer apply.

If you have questions after reviewing these guidelines, you can obtain more information from Active Living & Culture staff. Please contact staff well in advance of application submission:

Arts, Culture & Heritage Organizations:

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Organization Development Grants
ATTN: Cultural Services
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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 the 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

Organization Development Grants are 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 ORGANIZATION DEVELOPMENT PROGRAM OBJECTIVES AND DESCRIPTION

1.1 Objectives:

This program aims to provide assistance to non-profit sport, event, social service and cultural organizations for the purpose of undertaking activities or initiatives which develop the organization's capacity and sustainability.

Organizational capacity and sustainability describes a suite of planning and development tasks which are beyond the scope of normal day-to-day operations. These tasks usually fall within the purview of the organization's Board and management staff, but may also be led by committees, task forces or advisory groups.

The need for organization development may be identified by the organization itself, or it may arise through feedback from a funding agency, organization members or community stakeholders. Occasionally, organization development projects are undertaken because the organization has encountered a crisis or major challenge which cannot be resolved without the benefit of outside expertise and additional resources.

Examples of organization development projects include:

- board governance training for Board members, staff or volunteers
- dispute resolution and conflict management
- development of a strategic plan, marketing plan or succession plan
- a fund development strategy
- audience development or market research
- creation of a program evaluation tool or system

This list is not exhaustive and there may be other projects that meet the objectives of the program.

Broadly-stated outcomes of an organization development project include:

- increasing the ability to adapt to change;
- building organizational strength and resilience;
- enhancing the capacity of the organization to develop a broader and more sustainable funding model;
- being more strategic in the delivery of impactful programs and services in the community.

This program is not to be an ongoing source of support and the entry of new applicants into the program will be considered a priority. Organizations are limited to one grant from this program per calendar year and must have submitted a Final Report as a pre-condition for future eligibility.

1.2 Organization profile:

Organizations participating in this program are Kelowna-based, established, non-profit sport, event, social service or arts, culture and heritage organizations which have a mission to:

- deliver community sport programming, including structured coaching, officiating, training and competition, to its members;
- deliver an annual event of significant stature that has community-wide benefit and impact;

- generate, promote or accelerate socially beneficial services or programs in the City of Kelowna;
- develop, create, produce, present and disseminate artistic work in any artistic discipline (Indigenous arts, community arts, dance, interdisciplinary, literary, media, multidisciplinary, music, theatre, visual arts, fibre arts);
- create, provide or facilitate 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;
- provide public education, programs, events or services focused on awareness, appreciation and celebration of Indigenous and other ethno-cultural heritage, including language, traditions and art forms; or
- provide services or resources in support of local non-profit organizations in the areas of research, information, professional development, networking, administration, audience development, marketing and communications.

They have been incorporated and actively providing the majority of their public programs and services in Kelowna for at least two (2) years prior to the application deadline.

They demonstrate an inclusive, diverse and welcoming approach in their operations and activities. Event-based organizations must have delivered at least one public event in the 24 months preceding the submission of an application.

They have, in the 24 months preceding the submission of their application, received support from the City of Kelowna through one of the following avenues:

- Cultural Professional Operating Program
- Cultural General Operating Program
- Cultural Project Program
- Community Social Development Grants
- Event Hosting Program
- Community Sport Delivery Grant
- Major Events Program
- Active Living & Culture general budget
- non-market lease or other agreement providing use and occupation of City-owned property
- another avenue as may be identified by City staff

The organization has identified a need for organization development and has proposed a viable project with specific, measurable outcomes to address organization development needs.

Finally, they are committed to completing their project within 12 months of the grant award, unless alternate arrangements are made with City staff.

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 two (2) years at the time of the application submission;

- 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 two (2) years at the time of the application submission;
- have a sport, event, social service or cultural mandate and profile which is consistent with these guidelines;
- have fulfilled all reporting requirements for any previous grants or funding support from the City of Kelowna;
- have a 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; and
- provide a current year operating budget and prepared financial statements for the most recently completed fiscal year.

1.4 *Ineligible organizations are:*

- 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; or
- unincorporated committees, groups, collectives or individuals.

1.5 *Eligible activities and expenses are:*

- **Contracting an experienced and qualified consultant** – professional fees, reasonable expenses and disbursements, including travel and accommodation are eligible. The consultant should be independent from the organization and cannot be a current member of the applicant's Board of Directors; or
- **Attending a reputable and relevant training course, workshop, seminar or conference** – tuition or registration fees, certification fees and costs of learning materials are eligible. Travel and accommodation costs are not eligible. Must provide a clear description of how attendance will benefit the development of the organization.

Organization Development grants are a type of project grant and are available for up to a maximum of \$5,000. Two or more organizations may partner on an organization development project and undertake joint planning or training.

1.6 *Ineligible activities and expenses are:*

- 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;
- organization start-up costs or ongoing operating or administration expenses;
- costs of décor, food, beverage and purchased advertising;
- retroactive funding for initiatives which have already occurred;

- deficit reduction;
- bursaries or scholarships;
- development of capital proposals or feasibility studies; or
- activities focused on politics, education, religion or advocacy.

2.0 APPLICATION PROCESS

The application process is now online and can be found on the [City's website](#).

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

- Review these guidelines;
- Attend a grant information workshop in October 2020; and
- Contact City staff if you require more information
 - Christine McWillis, cmcwillis@kelowna.ca, (250) 470-0640
 - Nicole Cantley, ncantley@kelowna.ca, (250) 469-8650

Eligible applicants will submit the application form using the online system.

Only online applications will be accepted. If you are having problems with the online system, please contact culture@kelowna.ca.

Please ensure you receive email confirmation upon submission.

Incomplete or late applications will not be accepted. Submission of an application does not guarantee funding. Obtaining an Organization Development grant is a competitive process and demand often exceeds available resources

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%) – clearly identified rationale for the project, qualifications and expertise of identified consultant OR alignment of identified training course with project rationale, likelihood that the project will address identified issues.

Feasibility of Proposed Project (30%) – defined milestones and reasonable timelines, commitment and ability to complete the project within 12 months of award unless otherwise arranged, reasonable project budget, active involvement of Board of Directors, management staff or other organization leadership in initiative.

Outcomes of Proposed Project (40%) – clearly identified deliverables and measurable outcomes for the project, how the organization will evaluate the success of the project, commitment/plan from the organization to follow through with project learnings, legacy potential of project (how knowledge will be passed along within organization structure and beyond, if applicable).

Detailed criteria are listed in Schedule 1 of these Guidelines.

4.0 ASSESSMENT OF APPLICATIONS

4.1 *Staff Review:*

Applications in this program are evaluated through Active Living & Culture staff review, which enables a streamlined and expedited process. Staff may call upon experienced sector or discipline experts or funding agencies in an advisory capacity if circumstances warrant.

Review will take place within 30 days of a completed application being received.

4.2 *Interview:*

Following completion of the staff review, 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 organization.

4.3 *Notification and Distribution:*

Applicants will receive an email notification of evaluation and a letter of confirmation detailing any terms and conditions, feedback or follow up items, within 14 days of notification. Payment will follow shortly after and is distributed through mail or electronic fund transfer.

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 must provide a Final Report in a prescribed format to the Active Living & Culture Division. Receipt of a completed report is a pre-condition for future eligibility in any City of Kelowna grant program. Final Reports may also be considered part of the assessment of any future applications by the organization.

Final Reports for Organization Development Grants must be submitted within 60 days of completion of the project, unless other arrangements are made with staff.

5.0 TIMELINE

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

Deadline	Staff Review	Email Notification and Confirmation Letter	Final Report
Open Intake	Within 30 days of receipt of a completed application	Within 14 days of staff review	Within 60 days of project completion

6.0 CONDITIONS OF FUNDING

In addition to any specific terms and conditions which may arise from the staff review, 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, the City must be notified in writing immediately and must provide approval for 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 agrees to indemnify and save harmless the City and its elected and appointed officials, officers, and employees, in respect of all claims for bodily injury or death, property damage, or other loss or damage arising from the conduct of any work by or any act or omission of the organization or any directors, officers, volunteers, or employees, of the organization; and
- 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.

SCHEDULE 1 – DETAILED ASSESSMENT CRITERIA: CONSULTANT APPLICATION		
Project Quality 30%	Q2	The objectives for the project are clearly articulated.
	Q3	The project is likely to improve the capacity and sustainability of the organization.
	Q4	The rationale for the project is consistent with the program objectives.
	Q5	The applicant has identified a consultant with appropriate qualifications; or has provided information about a reputable training course, workshop, seminar or conference that aligns with the project rationale and objectives.
	Q6	Current letters of commitment have been provided by named partners and collaborators, if applicable.
Project Feasibility 30%	Q7/8	The project will be completed within 12 months of grant approval or an alternative timeline has been justified.
		Feasible project milestones (phases, stages) have been identified, if appropriate.
	Q9/10	The project budget is reasonable; expenses are aligned with project objectives and outcomes.
	Q9-11	The organization has sufficient human and financial resources to support the project and the project budget.
	Q11	The applicant has identified active and appropriate project leadership and participation from within the organization.
Project Outcomes 40%	Q12	The organization has demonstrated it is committed to changing and improving its governance and/or operations as a direct result of the project.
		There are clearly identified deliverables and specific measurable outcomes for the project.
		The applicant has determined how the project will help the organization to be more successful in the future.
	Q13	The applicant has indicated how knowledge arising from the project will be shared and used within the organization (and possibly beyond the organization).

SCHEDULE 2 – DETAILED ASSESSMENT CRITERIA: WORKSHOP APPLICATION		
Project Quality 30%	Q3	The training is likely to improve the capacity and sustainability of the organization. The applicant has identified a course that meets the objectives of the program.
	Q4	The rationale for attending the training is consistent with the program objectives.
Project Feasibility 30%	Q5	The training will be completed within 12 months of grant approval or an alternative timeline has been justified.
	Q6	The applicant has identified active and appropriate participation from within the organization.
	Q7	The workshop expenses are reasonable given the course timeline and content covered.
	Q8/9	The organization has sufficient human and financial resources to support attendance at the training and the training budget.
Project Outcomes 40%	Q10	There are clearly identified deliverables and specific measurable outcomes for the training.
		The applicant has determined how the training will help the organization to be more successful in the future.
	Q11	The applicant has indicated how knowledge arising from the training will be shared and used within the organization (and possibly beyond the organization).