



General Operating Grant Program: Sample application

This is a sample of the online application and final report, provided to assist you in preparing for the Operating Grant process. Questions are subject to change from year-to-year and some variation may occur.

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

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General Operating Grant
City of Kelowna Cultural Services Branch
Smith Avenue Offices
101-1360 Ellis Street
Kelowna, BC V1Y 2A2
HOURS: Monday to Friday, 8 a.m. to 4 p.m.



Section 1: Application

Eligibility Questionnaire

1. Has your organization been a registered non-profit society or registered charity with the CRA for at least 1 year before the application deadline?
2. Has your organization been physically located in Kelowna for at least 1 year?
3. Does your organization work towards any of the below 2020-2025 Cultural Plan goals?

<p>STRATEGIC INVESTMENTS</p> <p><i>foster deliberate investments of time, money and people into demonstrated outcomes</i></p>	<p>Goal 1: Increase contribution of resources</p> <p>Develop a variety of approaches to increase support for the creative sector's spaces, capacity, vitality and connections</p>	<p>Goal 2: Understand our impact</p> <p>Leverage the value that culture contributes to the community</p>	
<p>SPACES</p> <p><i>use new and traditional approaches for enhancing the availability, affordability and accessibility of spaces for culture</i></p>	<p>Goal 3: Optimize existing spaces</p> <p>Improve the use of existing space and allow for alternative solutions to meet community needs</p>	<p>Goal 4: Commit to developing new facilities</p> <p>Actively plan and seek opportunities for the advancement of new cultural facilities</p>	
<p>VITALITY</p> <p><i>animate the community with a blend of programs, services and events that promote artistic excellence and share Kelowna's history</i></p>	<p>Goal 5: Learn from our past</p> <p>Engage the public in the protection and preservation of Kelowna's human and natural history and bring stories about our past to the forefront</p>	<p>Goal 6: Boost vitality at the street level</p> <p>Create excitement and activity throughout Kelowna</p>	
<p>CAPACITY</p> <p><i>build on the creative sector's ability to respond to changing demands and new opportunities</i></p>	<p>Goal 7: Support a viable creative sector</p> <p>Enhance administrative, financial, management and governance systems that create a strong foundation for the future</p>		
<p>CONNECTIONS</p> <p><i>promote ongoing interactions between people, sectors and disciplines</i></p>	<p>Goal 8: Share our story</p> <p>Celebrate local activities, initiatives and successes with the broader community</p>	<p>Goal 9: Broaden the reach</p> <p>Incorporate culture within other sectors as an integral piece of community growth</p>	<p>Goal 10: Convene and connect</p> <p>Bring the creative sector together for dialogue, exchange and action</p>

4. Is your organization committed to providing art, culture or heritage opportunities to Kelowna residents without exclusion by religion, ethnicity, gender, age, sexual orientation, language, disability or income?
5. Does your organization have an independent Board of Directors?
6. Can you demonstrate financial support to your organization from other entities than the City of Kelowna?
7. Did you receive a City of Kelowna General Operating Grant for the previous year?

Organization Profile

1. Organization's Legal Name
2. Mailing Address
3. Organization Email
4. Phone Number
5. Registered Non-profit Society: **If YES**
 - B.C. Society Number
 - Date of incorporation
 - Organization Vision
 - Organization Mission
 - Organization Mandate
6. Registered Charity? **If YES**
 - Charitable Number
7. Primary Contact Information
8. Alternate Contact Information
9. Website
10. Social Media Links

Prior year information

Assessment Criteria:

- *There is evidence of demand and participation in the programs or services through quantifiable data including level of activity, attendance, participation, membership and volunteers.*
- *There is evidence of change or growth in demand and participation and/or in the quality or quantity of programs and services offered.*
- *There is evidence of a healthy overall financial position with adequate resources to support the organization's mission and goals.*

Community Impact

1. What were three of your greatest successes this past year? Please describe.
2. Please share a story about the impact of your programs/service on participants. This may be a

letter that you received about a participant's positive experience, or it may be something that you have witnessed. Note: These stories may be shared with others. The story should include the participants name, address and phone number and the participant must be made aware their story is being submitted to the City of Kelowna

3. Did attendance or participation in your programs increase, decrease or stay the same compared to previous years? What do you feel was behind the change?
4. Did you collaborate with other artists or organizations this year? (A true collaboration occurs when both parties obtain some benefit or have shared objectives)

Activities

1. Tell us about the activities, events and classes your organization has been involved in over the past year. This will help us to get to know your organization.

2. Main Events/Performances
Presented/organized by your organization over the prior year:

Performance #1

- Date
- Title
- # of artist/performers
- # of audience members/attendees
- *Add more as needed

3. Annual total of artists/performers

4. Classes/Workshops
Offered by your organization over the prior year

Classes/ Workshops #1

- Class/workshop name
- Description
- # of sessions offered
- # of individual participants
- *Add more as needed

5. Total # of Sessions of per Year

6. Fundraising Activities
Organized/offered by your organization

Fundraising Activity/Event #1

- Name / Description
- Net profit (revenue – expenses)
- # of people attending/participating

*Add more as needed

7. Net Profit \$
8. Organization Participation in Community Events

Participation in events presented/organized by a different organization in the community that your organization participated in.

- Community Event
- Date
- Title
- # of audience members/attendees
- Role in event

*Add more as needed

9. Annual total # of audience members attending events.
10. Extra-Ordinary Administrative Tasks (list non-annual tasks that required time of the organization this past year)

Volunteer Activities

Remember Board Members are also volunteers!

1. Volunteer hours contributed to your organization.
of volunteers
Total # of volunteer hours
2. Please list the roles volunteers play in your organization.

Role #1

Role name

*Add more as needed

Marketing Materials

Please provide 3-5 support materials (programmes, posters, social media posts, etc.) that reflect the type and quality of programming created, produced or presented by your organization in the last year.

Financial Information

Attach Financial Statements from the organizations most recent year-end, including an Income Statement and Balance Sheet.

Is there any other information you would like to add about your past year?

Strategic Investments

1. What amount are you requesting of the General Operating Program?

Note you cannot request more than \$10,000

2. Does your organization have a Strategic Plan?

Assessment criteria: The organization has clear, strategic goals that are linked to the mission, provide overall direction for the organization and drive day-to-day operations.

All organizations applying for \$5,000 or more in funding must provide their strategic plan to be eligible for funding.

3. Attach a copy of your organization's most recent Strategic Plan

Goals

1. Describe how your organization aligns with the guiding principles of the [2020-2025 Cultural Plan](#) as defined below. Describe and provide specific examples for each point.

Assessment criteria: The organization embraces and demonstrates the guiding principles of the 2020-2025 Cultural Plan.

- **Accessibility, diversity and inclusion:** we welcome everyone to engage in quality experiences that showcase the unique identity of our community.
- **Accountability and fiscal responsibility:** we use resources effectively to leverage opportunities that optimize value and create impact.
- **Innovation:** we support forward-thinking solutions that anticipate needs and bring together a range of experiences to see the future in a different way.
- **Partnerships and cooperation:** we achieve more through meaningful relationships of mutual respect and understanding.

2. How will your organization advance three (3) goals and strategies of the 2020-2025 Cultural Plan?

Assessment criteria: The organization is committed to advance the goals and strategies of the 2020-2025 Cultural Plan. Organization is evolving to reflect changes in the community and in the creative sector as a whole.

Please select 3 goals that your organization will focus its attention on.

Goal 1: Increase contribution of resources
Goal 2: Understand our impact
Goal 3: Optimize existing space
Goal 4: Commit to developing new facilities
Goal 5: Learn from our past

Goal 6: Boost vitality at a street level
Goal 7: Support a viable creative sector
Goal 8: Share our story
Goal 9: Broaden our reach
Goal 10: Convene and connect

Three goals selected:

Goal ?

Goal ?

Goal ?

- From the three goals you selected, pick a strategy from each goal and clearly describe how you will advance that goal and strategy in the upcoming year.

Please ensure you align your answers with the 2020-2025 Cultural Plan.

Goal #?:

Which strategy, from that goal, will your organization be advancing?

Describe how your organization will advance this strategy in the upcoming year.

How will you measure success?

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Describe how your organization will advance this strategy in the upcoming year.

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Which strategy, from that goal, will your organization be advancing?

Describe how your organization will advance this strategy in the upcoming year.

How will you measure success?

**Refer to the cultural plan at a glance to see all the specific strategies*

https://www.kelowna.ca/sites/files/1/docs/kelowna_2020-2025_cultural_plan_-_at_a_glance_-_updated_oct_2019-rotated.pdf

- Who benefits from your organization's activities and how do they benefit?

Assessment criteria: There is evidence of positive community impact to the program participants, organization volunteers and/ or the community at large.

- What data and feedback do you collect from your audience/participants to evaluate your programs and services?

Assessment criteria: The organization has a way to gather feedback about its programs and services and regularly evaluates and improves its programs and services in response.

- How have programs and services evolved or changed over time? What influences from the

community have motivated that change?

Assessment criteria: Programs have evolved or are evolving to reflect changes in the community and in the creative sector as a whole.

Vitality

1. Provide an outline of the programs and services you will be offering in the upcoming year.

Assessment criteria:

- *Programs and services are aligned with the organization's vision, mission and goals.*
- *The type and quality of programming is consistent with or exceeds industry standards.*

2. Main Events and Performances

List events organized/offered by your organization:

Event/performance #1

Approximate date:

Activity:

Projected Attendance:

of Artists/Performers:

*Add as needed.

3. Classes and Workshops

List classes and workshops organized/offered by your organization:

Class/workshop #1

Approximate date:

Activity (title and brief description):

Location:

Projected Attendance:

*Add as needed.

4. Fundraising Activities

List fundraising activities organized/offered by your organization:

Fundraising Activity #1

Activity (title and brief description):

Location:

Projected Attendance:

*Add as needed.

5. Projected Attendance Totals

The sum of the following four categories equals Total Participants.

Total audience in events/performances:

Total number of performers/artists:

Total number of Participants in classes/workshops:

Total number of participants in fundraising events:

Total Participants:

Capacity

1. Using the format in the [example provided](#), create a comparative operating budget that shows:

- Previously completed fiscal year actuals
- Current fiscal year budget and actuals to date
- Proposed next fiscal years budget
- You must explain any line variances of more than 20% between budget years

Assessment criteria: There is an appropriate balance between administrative and program-related costs to enable fulfillment of the organization's mission and objectives.

Assessment criteria: Sound financial and budgeting practices are in place with expenses aligned to realistic revenue projections.

2. Upload Complete Budget on template provided.

3. What action is being taken to address or reinvest any projected surplus or deficit?

4. In consideration of your organization's financials, what amount of revenue does each source represent?

Assessment criteria: Revenue includes diverse sources of support, including public sector, private sector, individual donations, self-generated revenue and in-kind support.

Source of Revenue	Total prior year revenue (from financial statements)	Total projected revenue (from budget)
Earned Revenue (All ticket sales, registration fees,		

memberships, etc.)		
Grants (All federal, provincial, municipal, foundation and gaming grants)		
Donations & Sponsorships (Cash)		

- How does the organization plan to ensure it is sustainable over time and through an unprecedented external environment?

Assessment criteria: There is evidence of financial planning for revenue-diversification, program support or growth, and to support long-term goals and strategies.

- Describe any in-kind contributions that your organization received during the last fiscal year. Include the name of the contributor and what it was.

- Attach a list of all current Board Members with occupations (or professional affiliations or expertise) and term start/end dates.

Assessment criteria: Board membership provides appropriate expertise and relevant community representation to support the mission, goals, and strategies of the organization.

- Are there any vacancies on your board?

- Attach an Organizational Chart that includes key personnel, such as staff, contractors or artistic leaders. [Sample Organizational Chart](#)

Assessment criteria: There are appropriate positions and structures in place to support operations, programs or services and align with mission, goals and strategies.

- Does the organization have any active committees?

Committee #1

Title of committee:

Description of roles:

*Add as needed

- Has the board or staff engaged in professional development, strategic planning or specialized training as it relates to the organization within the last year?

Assessment criteria: The organization invests in professional development for staff, board and volunteers to build on the organization's ability to respond to changing demands and new opportunities.

Please describe the training:

Training #1

What was the training (name and short description)

Who attended?
When was it?
*Add as needed

Connections

1. 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.)

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

Assessment criteria: The organization has leveraged its human and financial resources by actively collaborating with other organizations to deliver programs or initiatives.

Connection #1

Contact name:

Contact Organization:

Contact Phone:

Describe your working relationship with this partner:

*Add as needed

2. 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?

Assessment criteria: There are effective strategies in place to create awareness of, build appreciation for, and drive participation in the organization and its programs or services.

3. Please share any additional information with the Panel that has not already been shared.

Upload 1

BC Ministry of Finance, Form 4 (Annual Society Report)

Form 4 is the Annual Report required for the government of BC annually (usually done following your AGM). It is done on the Societies Online. Log in with your BCEID and then go to the organization at [Societies Online \(bcregistry.ca\)](http://Societies Online (bcregistry.ca)). [You can print this annual report provided you have filed it. You can read more about this at Not-for-profit organizations - Province of British Columbia \(g ov.bc.ca\) under maintain a society \(hold an annual meeting and file an annual report\).](#)

Please check that registered address is located within the City of Kelowna boundary

Upload 2

Constitution and Bylaws

Upload 3

Minutes from the last AGM

Upload 4

Certificate of Incorporation

Upload 5

Signed Information Release (sample attached)

Sample Information Release

Information Collection:

The information collected in these applications is for the purpose of adjudicating your grant application(s), administering grant funding and information, and data collection for reporting purposes. The legal authority for collecting this information is under the Freedom of Information and Protection of Privacy Act Section 26(c).

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 organization/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.

If you have any concerns about the collection of information, please contact culture@kelowna.ca.

Declaration:

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, 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 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;
- The organization will be required to provide 1-3 high-quality, clear images that portray the programs and services you are offering to the community with the Final Report. The images must be free of copyright from the photographer (signed release waiver) and signed or written permission of any person included in the picture for unlimited usage rights by the City of Kelowna;
- 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;

- The organization agrees to not take any action, or permit any directors, officers, volunteers or employees of the organization; to take any action which is intended, or would reasonably be expected, to harm the City's reputation, or which would reasonably be expected to lead to unwanted or unfavorable publicity to the City; provided, however, the foregoing limitation shall not apply to compliance with any legal process or statements made in response to authorized inquiry from a court or regulatory body; and
- Receipt of a grant does not guarantee funding in the future.

Submission of a General Operating Grant application does not guarantee funding. Obtaining a grant is a competitive process and demand often exceeds available resources.

Form requires two signatures of authorized representatives of the organization with their role in the organization.

Section 2: Final Report

Assessment Criteria:

- 1. There is evidence of demand and participation in the programs or services through quantifiable data including level of activity, attendance, participation, membership and volunteers.*
- 2. There is evidence of change or growth in demand and participation and/or in the quality or quantity of programs and services offered.*
- 3. There is evidence of a healthy overall financial position with adequate resources to support the organization's mission and goals.*

Community Impact

1. What were three of your greatest accomplishments this past year? Please describe.
2. What outcomes did your organization achieve this year?

For example:

- Increased membership, audience or social media followers. New partnerships with organizations, artists or businesses. Achievements from artists/performers/participants.
 - Increased revenue through direct sales, sponsorships etc. Improved support to artists.
 - Results from audience/ artists/ performers/ participants through formal surveys.
3. Please provide specific quantitative or qualitative data that support the outcomes.
 4. Please share a story about the impact of your programs/service on participants. This may be a letter that you received about a participant's positive experience, or it may be something that you have witnessed.

Note: These stories may be shared with others. The story should include the participants' name, address and phone number and the participant must be made aware their story is being submitted to the City of Kelowna.

5. Upload prior year confirmation letter with feedback.
6. As part of the review process, your organization was provided with feedback based on commentary from the review committee. Referring to this feedback, please comment on what actions your organization has taken to address the concerns.
7. Did attendance or participation in your programs increase, decrease or stay the same compared to previous years?

8. What do you feel was behind the change?
9. Refer to the Strategic Investments section in your application under the heading GOALS.

How did your organization advance three (3) goals and strategies of the 2020-2025 Cultural Plan? The goal and strategies must directly relate to your application.

Goal #1

Goal name:

Strategy chosen:

Be Specific about how your organization advanced this strategy, including any data you have collected to support your claims:

Goal #2

Goal name:

Strategy chosen:

Be Specific about how your organization advanced this strategy, including any data you have collected to support your claims:

Goal #3

Goal name:

Strategy chosen:

Be Specific about how your organization advanced this strategy, including any data you have collected to support your claims:

10. Describe how you collaborated with other artists or organizations this year? A true collaboration occurs when both parties obtain some benefit or have shared objectives.

Activities

Presented/organized by your organization.

1. Main Events/Performances

Performance #1

- Date
 - Title
 - # of artist/performers
 - # of audience members/attendees
- *Add as needed

Annual total of artists/performers:

Annual total participants:

2. Classes/Workshops

Offered by your organization:

Classes/ Workshops #1

- Class/workshop name
 - Description
 - # of sessions offered
 - # of individual participants
- *Add as needed

3. Total # of Sessions of per Year

4. Fundraising Activities
Organized/offered by your organization

Fundraising Activity/Event #1

- Name / Description
 - Net profit (revenue – expenses)
 - # of people attending/participating
- *Add as needed

Number of people attending/participating
Total participants
Net Profit \$

Organization Participation in Community Events

Participation in events presented/organized by a different organization in the community that your organization participated in.

1. List Community Events your organization participated in.

Community Event #1

- Date:
 - Title:
 - # of audience members/attendees
 - Role in event:
- *Add as needed

Annual total number of audience members attending events:

2. Extra-Ordinary Administrative Tasks (list non-annual tasks that required time of the organization this past year)

Volunteer Activities

Remember Board Members are also volunteers!

1. Volunteer hours contributed to your organization:

Role #1
Role name:

*Add as needed

Marketing materials and photos

1. Please upload 3-5 support materials (programmes, posters, social media posts, etc.) that reflect the type and quality of programming created, produced or presented by your organization in the last year.
2. Upload 3 high-quality, clear photos (in digital format) from programs and services.
3. Please upload signed release waiver(s) including both photographer and participant(s) waivers for each photo provided.

Financial Information

1. Attach Financial Statements from the organizations most recent year-end, including an Income Statement and Balance Sheet

For example:

If your year end is December, your most recent financial statements would be from December in the year 2023. If your year end is March, your most recent financial statements would be from March 2024.

2. Is there any other information you would like to add about your past year?
3. Will you be applying for General Operating funding next year?