



2009 Funding Application Information

The City of Kelowna has entrusted the Arts Council of the Central Okanagan (ARTSCO) to distribute the 2009 City of Kelowna Arts Funds to the amateur arts community in order to further promote, encourage and assist in the artistic and cultural development of Kelowna.

The objective of ARTSCO is to provide a fair, balanced and efficient funding system for the arts and cultural community of Kelowna. The applicant will provide information regarding its activities and events and its organization and management in order to determine the appropriate amount of funding.

Eligibility

Funding consideration is given to non-profit societies that:

- Have completed at least one full year of operation;
- Are registered and in good standing with BC Corporate Registry;
- Are involved in arts-focused activities and events primarily (but not exclusively) operating in the City of Kelowna;
- Include youth, seniors, culturally diverse groups and people of all abilities in their activities and events;
- Whenever possible produce/present activities and events in venues that accommodate people of all abilities;
- Maintain a program for recruiting, training and utilizing volunteers;
- Demonstrate a diversified revenue base including significant earned revenues and/or government support, and revenues from the private sector through fundraising, donations or endowment funds;
- Demonstrate administrative capabilities including the establishment of short and long term goals, marketing plans, sound financial management and board development;
- Demonstrate the ability to carry out their proposed activities and events.

The Arts Council of the Central Okanagan (ARTSCO) will **not** fund:

- Individuals;
- Groups whose majority of activities and events occur outside the City of Kelowna;
- Organizations that provide third party funding;
- Travel expenses;
- Construction, capital improvements or repair costs;
- Specific projects;
- Educational or religious organizations.

Conditions of Assistance

As a condition of funding:

- The support of the City of Kelowna and the Arts Council of the Central Okanagan must be acknowledged on all promotional materials. The City of Kelowna logo and ARTSCO logo must be used on all posters, brochures, print ads, programs and, where possible, on media releases and signage. Both logos will be provided upon request.

Instructions for Completing the Application

- The application form can be completed electronically (the application is provided in Word Document for your convenience), or printed off and completed by hand.
- Respond to every question completely and accurately.
Incomplete applications will be subject to disqualification. Refer to the checklist of required documents and attachments on page 9.
- List or outline in point form as indicated.
- Add additional pages if necessary.
- Note that Forms 2, 3, and 4 require further information to be filled out as separate forms and attached to the application. These forms are provided in letter and legal size format for your convenience.
- Include **ONLY ONE COPY** of up-to-date brochures, publications and other publicity materials promoting your activities and events.
- At least one completed application form must have original signatures; additional copies may have photocopied signatures.
- Attend the **2009 Grant Information Session** to discuss your questions regarding the 2009 application.
- Contact ARTSCO electronically at info@artsco.ca for clarification or further information regarding eligibility or the application process.
- Keep a copy of your application for your records.

Submitting the Application

Deliver 12 copies of your application on or before 2:00pm **FRIDAY, FEBRUARY 13, 2009** to:

City of Kelowna Reception Desk (Second Floor)
1435 Water Street
Kelowna, British Columbia
Attention: Arts Council of the Central Okanagan

No late applications will be accepted.

Incomplete applications will be subject to disqualification.

Refer to the checklist of required documents and attachments on page 9.

The Evaluations Process

- ARTSCO evaluates the applications and recommends grants in March. ARTSCO recommendations are based on information provided in the application. Therefore, applicants should ensure all information is correct and complete. **Incomplete applications will be subject to disqualification.** Refer to the checklist of required documents and attachments on page 9.
- ARTSCO's recommendations are presented to Kelowna City Council for approval as soon as possible after deliberations are complete.
- Subject to the approval of Kelowna City Council approval, ARTSCO's decisions are final.
- Grants are usually distributed within two week's of Council approval.

Questions?????????

If you have any questions regarding your organization's eligibility or the grant application process, contact ARTSCO electronically at info@artsco.ca

AND

Attend the **2009 Grant Information Session:**

The Kelowna Community Theatre

1375 Water St

Kelowna, BC V1Y 9R3

Saturday, January 17, 2009

10:00 – 10:30am Networking

10:30 – 11:15am Grant Information Session

Organization Identification

Organization Name: _____

Address: _____

Phone: _____ Fax: _____

Website: _____ Email: _____

Contact: _____ Title: _____

Phone: _____ Email: _____

Alternative: _____ Title: _____

Phone: _____ Email: _____

2009 Grant Request

Fiscal/Application Year:

Fiscal Year _____(Day) _____(Month) TO _____(Day) _____(Month)

For purpose of this application, ARTSCO assumes your organization will be requiring a grant for your fiscal year, ending in 2009.

If this is not correct, please provide the dates for which you will be requiring a grant. This term will be of one's year duration, ending in 2009.

_____ TO _____

Funds requested: \$_____

Percentage request: _____%

Note: the percentage is be based on **Projected Total Revenue** from attachment "Form 1 Projected and Actual Financial Information" (pages 11 & 12)

New Applicant

Previous Applicant

Amount of last grant received from ARTSCO: \$_____ Year _____

If your request has increased from your most recent application please provide brief explanation. – in point form.

Eligibility

Date organization was established: _____

Is your organization a registered non-profit society? Yes No

Attached **1 copy** of your organization's latest Annual Return filed with BC Corporate Registry.

Outline – in point form - your arts-focused activities and events, including location where these activities and events take place.

Outline – in point form - how your organization includes youth, seniors, culturally diverse groups and people of all abilities in its activities and events.

List the venues your organization utilizes for producing/presenting its activities and events.

Number of volunteers: _____ Total annual volunteer hours: _____

Do you have job descriptions for your volunteers? Yes No

List the roles of volunteers within your organization.

List your methods of recruiting volunteers for your organization.

List your methods of training volunteers.

Complete the attached “**Form 1 Projected and Actual Financial Information**” (pages 10 & 11) for your Fiscal/Application Year and for the past year.

Add categories as necessary and provide specific information as required.

Outline – in point form – your organization's short-term and long-term goals.

List your target audience and/or targeted participants for your activities and events.

Outline – in point form - initiatives undertaken the past year to diversify and to increase the audience and/or participation for your organization's activities and events. Include the success or failure of these initiatives.

Complete the attached “**Form 2 Marketing Plans for Fiscal/Application Year**” (page 12) to provide a summary of your Fiscal/Application Year’s marketing initiatives for each of your organization’s planned upcoming activities and events. [Note: This form is available in letter and letter size format for your convenience.]

Include **one copy** of brochures, publications or other publicity materials promoting your activities and events with your application

Does your organization review budgets?

- Annually Quarterly Monthly

Does your organization update financial records?

- Annually Quarterly Monthly

If your organization has a deficit or accumulated debt, outline your debt reduction plan?

If your organization has reserve funds, outline your organization’s plans for these funds?

Outline – in point form - steps is your organization taking to attain financial self-sufficiency?

Attach the following financial statements to your application:

Balance Sheet for your most recent year end.

Profit and Loss Statement for your most recent year end.

If your fiscal year end is prior to December 31, 2008, include a Balance Sheet and Profit and Loss Statement for the interim period (i.e. if year end is May 30, 2008, attach Balance Sheet and Profit and Loss Statement for period June 1, 2008 to December 31, 2008).

Complete the attached:

Form 3 **Activities and Events – Past Year** (page 13)

Form 4 **Activities and Events – Fiscal/Application Year** (page 14)

[Note: These forms are available in both legal and letter size format for your convenience.]

Declaration

Organization Name: _____

We declare the information submitted for consideration is true and accurate to the best of our knowledge. We hereby make application to the City of Kelowna Arts Foundation and declare that the funds will be used as described in our request. Funds received and not so used will be returned to the City of Kelowna Arts Foundation.

Signature

Title

Printed Name

Date

Signature

Title

Printed Name

Date

IMPORTANT – APPLICATION CHECKLIST – NEXT PAGE

Incomplete applications are subject to disqualification.

→→→→→ **Application Checklist** ←←←←←

- 1 Application Form with *original signatures*
- 1 Copy of Latest Annual Return filed with BC Corporate Registry
- 1 Copy of Marketing Materials (brochures, publications, or other publicity material) Promoting Activities and Events
- Application Form Copies **INCLUDING:**
 - Balance Sheet for Most Recent Year End
 - Profit and Loss Statement for Most Recent Year End
 - If Year End prior to December 31, 2008;
 - 1 copy of Balance Sheet for Interim Period
 - 1 copy of Profit and Loss Statement for Interim Period
 - Form 1 Projected and Actual Financial Information for Fiscal/Application Year (pages 10 & 11_
 - Form 2 Marketing Plan for Fiscal/Application Year (page 12)
 - Form 3 Activities and Events – Past Year (page 13)
 - Form 4 Activities and Events – Fiscal/Application Year (page 14)

FORM 1 PROJECTED AND ACTUAL FINANCIAL INFORMATION

REVENUE	Projected for Fiscal/ Application Year	Actual for Past Year
	Dates:	Dates:
Earned	\$	\$
Memberships	\$	\$
Ticket Sales	\$	\$
Other (activities, rentals, etc. - please specify)	\$	\$
	\$	\$
Subtotal	\$	\$
Fundraising	\$	\$
Donations (cash, equipment, services, etc. - please specify)	\$	\$
Sponsorships	\$	\$
Funding activities	\$	\$
Gaming	\$	\$
Program Advertising	\$	\$
Subtotal	\$	\$
Grants	\$	\$
City of Kelowna Arts Foundation		
BC Arts Council	\$	\$
Canada Council for the Arts		
Other Arts Programs (please specify)		
Other Federal Programs (please specify)		
Other Provincial Programs (please specify)	\$	\$
Other Municipal Programs (please specify)	\$	\$
Subtotal	\$	\$
Total Revenue	\$ **	\$

EXPENSES	Projected for Fiscal/ Application Year	Actual for Past Year
	Dates:	Dates:
Administration		
Manager	\$	\$
Other Staff	\$	\$
Bookkeeper	\$	\$
Accounting	\$	\$
Advertising/Marketing	\$	\$
Artist Fees	\$	\$
Equipment Purchases (please specify)	\$	\$
Insurance	\$	\$
Maintenance & Repairs	\$	\$
Office Supplies (incl. postage, stationary)	\$	\$
Production Costs	\$	\$
Rent/Lease	\$	\$
Telephone	\$	\$
Utilities	\$	\$
Other (bank fees, etc., please specify)	\$	\$
Total Expenses	\$	\$
Surplus/Deficit	\$	\$

**** Projected Revenue for percentage request of total projected revenue on page 4 of application.**

FORM 2 MARKETING PLANS FOR FISCAL/APPLICATION YEAR

**Please note that marketing initiatives should be provided for each planned activity/event.
Add more to form to provide additional information.**

	ACTIVITY/EVENT MARKETING INITIATIVES FOR ACTIVITIES AND EVENTS
1	
2	
3	
4	
5	
6	
7	
8	

FORM 3 ACTIVITIES AND EVENTS – PAST YEAR

	Activity/Event	Performance Dates	# of Artists/ Participants	Target Audience/ Participants	Ticket Price	Venue Capacity	# Projected Audience/ Participants **	Actual Attendance (Excluding Comps.) **	# of Comps. Issued	To Whom Comps. Issued	Actual Profit/ Loss
1											
2											
3											
4											
5											
6											
7											
8											

** Where projected audience and/or participation was less than actual attendance (excluding complimentary tickets), provide explanation – for each activity and event where this occurred. Add additional sheets, if required.

FORM 4 ACTIVITIES AND EVENTS – FISCAL/APPLICATION YEAR

	Activity/Event	Performance Dates	Estimated # of Artists/ Participants	Target Audience/ Participants	Ticket Price	Venue Capacity	# Projected Audience/ Participants	Projected # of Comps. To Be Issued	To Whom Comps. To Be Issued	Projected Profit/ Loss
1										
2										
3										
4										
5										
6										
7										
8										