
2010 Community Investment Program Festival Operating Grant

The deadline for submission of this application is **4:30 p.m. on November 1, 2009**. Incomplete or late applications will not be accepted or considered. Applications must be delivered to the office of the Edmonton Arts Council 10440 - 108 Avenue, Edmonton, Alberta, T5H 3Z9.

I. General Information

Name of Festival

2010 Festival Dates

Primary Location

Name of Organization

Address

Postal Code

Telephone

Fax

Primary Contact

Title

Email Address

President/Chairperson

Address

Postal Code

II. Grant Request

This amount must match the amount budgeted in Attachment I: \$ _____

III. Declaration of Officers:

In making this application, we the undersigned officers of the applicants, hereby represent to the City of Edmonton through the Edmonton Arts Council and declare that to the best of our information and belief the information provided is truthful and accurate; the application is made on behalf of the organization named on this page with its full knowledge and consent; the applicant organization meets all of the criteria of fundamental eligibility to apply for a 2010 City of Edmonton Festival Operating Community Investment Grant through the Edmonton Arts Council.

Dated at Edmonton, Alberta this _____ day of _____, 2009

Signature of Officer

Name (please print)

Title

Signature of Officer

Name (please print)

Title

The information on this application is being collected under the authority of Section 33(c) of the FOIP Act and will be used by the Edmonton Arts Council to determine eligibility for a Community Investment Program Grant and for purposes of administering the Community Investment Grant Program. The aggregate data may be used for program planning and evaluation. All information collected by the City of Edmonton and the Edmonton Arts Council is protected by the provisions of the FOIP Act. You may direct questions about the collection, use or disclosure of your personal information by this program to the Edmonton Arts Council at (780) 424-2787.

IV. All Applications must include the following:

Note: There have been some changes and additions to this section of the application. Please review thoroughly to ensure your application is complete.

1. **An evaluation of the previous festival produced by the applicant.** This should include descriptions of:
 - i. The festival theme and core program content.
 - ii. Any **NEW** elements in programming, promotion, accessibility, etc initiated in the previous festival.
 - iii. Any planned program elements that did not occur and an explanation as to why they did not occur
 - iv. Any additional cultural development initiatives/programs and the benefits realized to the community at large or specific non-profit communities.
 - v. Any collaborative or cooperative partnerships or ventures with other non-profit organizations
 - vi. Any activities undertaken, either independently or cooperatively, to attract tourists to the festival.
 - vii. A summary of the media coverage of the festival and examples of materials used to publicize the festival including examples of recognition of support by the City of Edmonton and the Edmonton Arts Council.
 - viii. The organization's volunteer program including the number of volunteers and number of hours of service contributed by those volunteers in 2009. Describe the tasks undertaken by volunteers as well as methods used to recruit, train and recognize volunteers.
 - ix. Total attendance including total paid attendance and total free attendance. Describe the methods used to calculate free attendance and indicate the number of free events as well as the number of free event hours.
 - x. The average ticket price and range of ticket prices.
 - xi. The total number of performing or creative artists employed or contracted and the number of those who live within the greater Edmonton area.
 - xii. The total number of other persons employed or contracted and the number of those who live within the greater Edmonton area.
 - xiii. Completed Attachment 3 - Festival Statistics

2. **A detailed description of the planned 2010 festival including:**
 - i. Core program plans identifying (where applicable) changes from the previous festival and proposed initiatives.
 - ii. All significant or new marketing strategies.
 - iii. Projected attendance.
 - iv. Any additional information you would like considered. (Green initiatives, outreach to culturally diverse audiences, upcoming anniversary, new artistic or public programming, etc.)
3. **A list of the current Board of Directors** including names, addresses and position of each member.
4. **The most recent annual report** or, minutes of the most recent Annual General Meeting of the society including all related reports.
5. **The financial statements, including a balance sheet and statement of revenue and expenses, presented to the members of the society at the most recent AGM.** These financial statements (for the last fiscal year) must be verified in the following manner:
 - Funding requests of less than \$25,000 require financial statements independently reviewed and/or signed by board members other than the Treasurer as specified in your Society Bylaws.
 - Funding requests of \$25,000 to \$100,000 require reviewed financial statements with a review engagement report signed by a CA, CGA or CMA.
 - Funding requests of greater than \$100,000 require audited financial statements audited and signed by a CA, CGA or CMA with an auditor's report.
6. **A summary of the organization's financial activities including:**
 - i. Completed Attachment 1-Financial Information Forms.
 - ii. A summary of the purpose for any designated funds held by the organization, if applicable (see Attachment 2).
 - iii. A description of the debt management plan or repayment schedule if the accumulated short-term debt incurred on operations exceeds 15% of annual operating budget.
7. **The most recent financial statements of any organization related at less than "arms length" to the applicant organization** (e.g., Foundations, support organizations), if applicable.
8. **A description of any major changes in the organization in the past year.** This includes significant changes in financial operations, organizational structure, personnel, etc.
9. **By-laws of the society** if this is the first application by the organization.
10. **Amendments to the society's by-laws** passed between the last application and this application.
Please submit filed and stamped copy from Corporate Registry.
11. **Proof of Filing the most recent Annual Return** with Corporate Registry of the Province of Alberta.

The Freedom of Information and Protection of Privacy Act (FOIP) regulates the collection and disclosure of personal information by municipalities and municipal boards and agencies. The privacy of personal information requested in the Community Investment Grant applications is protected by the FOIP Act. Organizational information may not be protected from disclosure in the interest of subjecting local government activity to public scrutiny. Aggregate information about programs funded through Community Investment Grants may be compiled and reported. Your organization will be contacted if any third party requests specific organizational information contained in your application.

2010 Community Investment Program Festival Operating Grant

Attachment 1 - Financial Information Form

A) Earned Revenue	Last Fiscal Year Actual	**Current Fiscal Year to 09/30/09	Current Fiscal Year Projections	Next Fiscal Year Budget
Membership Fees				
Ticket Sales/Admissions				
Bar/Concession				
On site sales (Memorabilia)				
Advertising				
Equipment Rental				
Raffle (net)				
Bingo (net)				
Casino (net)				
Other (specify)				
Total Earned Revenue				

B) Private Sector Support	Last Fiscal Year Actual	Current Fiscal Year to 09/30/09	Current Fiscal Year Projections	Next Fiscal Year Budget
Corporate sponsorship (cash)				
Individual donations (cash)				
Foundations grants				
Other (specify)				
Total Private Sector Support				

C) Donated Goods and Services in Kind (specify)	Last Fiscal Year Actual	Current Fiscal Year to 09/30/09	Current Fiscal Year Projections	Next Fiscal Year Budget
Total Donated Goods and Services in Kind¹				

**This column is required only if the organization's year-end occurs prior to July 31, 2009.

¹ If the value of Donated Goods & Services(C) exceed 15% of Total Revenue (F), a detailed breakdown of Total Donated Goods & Services must accompany this application. Please indicate if the value of donated goods and services in kind are recognized on the organization's audited/reviewed financial statements.

**2010 Community Investment Program Festival Operating Grant
Attachment 1 - Financial Information Form**

D) Public Sector Support	Last Fiscal Year Actual	Current Fiscal Year to 09/30/09	Current Fiscal Year Projections	Next Fiscal Year Budget
Federal				
Canada Council				
Canadian Heritage				
Other (specify)				
Provincial				
Alberta Foundation for the Arts				
Alberta Lotteries Fund				
Employment (specify)				
Other (specify)				
Municipal				
Festival Operating				
Community Investment Program				
Other (specify)				
Other (specify)				
Total Grants				

E) Other Income	Last Fiscal Year Actual	Current Fiscal Year to 09/30/09	Current Fiscal Year Projections	Next Fiscal Year Budget
Investments				
Other (specify)				
Total Private Sector Support				

F) Total Revenue	Last Fiscal Year Actual	Current Fiscal Year to 09/30/09	Current Fiscal Year Projections	Next Fiscal Year Budget
(A+B+C+D+E)				

If applicable, revenue not associated with the festival.²	Last Fiscal Year Actual	Current Fiscal Year to 09/30/09	Current Fiscal Year Projections	Next Fiscal Year Budget

² This is only relevant to those organizations that produce events in addition to the festival. The sum of this figure and the figure calculated as Total Revenue (F) should, in the column labeled "last fiscal year actual", correspond to the amount stated on the reviewed or audited financial statements.

**2010 Community Investment Program Festival Operating Grant
Attachment 1 - Financial Information Form**

G) Artist Expenses (specify)	Last Fiscal Year Actual	Current Fiscal Year to 09/30/09	Current Fiscal Year Projections	Next Fiscal Year Budget
Total Artist Expenses				

H) Production Expenses (specify)	Last Fiscal Year Actual	Current Fiscal Year to 09/30/09	Current Fiscal Year Projections	Next Fiscal Year Budget
Total Production Expenses				

I) Marketing Expenses (specify)	Last Fiscal Year Actual	Current Fiscal Year to 09/30/09	Current Fiscal Year Projections	Next Fiscal Year Budget
Total Marketing Expenses				

J) Administration Expenses (specify)	Last Fiscal Year Actual	Current Fiscal Year to 09/30/09	Current Fiscal Year Projections	Next Fiscal Year Budget
Total Administration Expenses				

**2010 Community Investment Program Festival Operating Grant
Attachment 1 - Financial Information Form**

K) Other Expenses (specify)	Last Fiscal Year Actual	Current Fiscal Year to 09/30/09	Current Fiscal Year Projections	Next Fiscal Year Budget
Total Other Expenses				

L) Total Expenses	Last Fiscal Year Actual	Current Fiscal Year to 09/30/09	Current Fiscal Year Projections	Next Fiscal Year Budget
(G+H+I+J+K)				

If applicable, expenses not associated with the festival.³	Last Fiscal Year Actual	Current Fiscal Year to 09/30/09	Current Fiscal Year Projections	Next Fiscal Year Budget

Summary	Last Fiscal Year Actual	Current Fiscal Year to 09/30/09	Current Fiscal Year Projections	Next Fiscal Year Budget
Total Revenue (Box F)				
Total Expenses (Box L)				
Surplus (Deficit)				
Accumulated Surplus (Debt)				
Total Designated Funds—see Attachment 2				

³ As noted earlier, this is only relevant to those organizations that produce events in addition to the festival. The sum of this figure and the figure calculated as Total Expenses (L) should, in the column labeled “last fiscal year actual”, correspond to the amount stated on the reviewed or audited financial statements.

2010 Festival Operating Community Investment Grant

Attachment 2 - Designated Funds

Attach a summary of the designated funds held by the applicant.

Indicate the total funds designated, as of the end of the most recently ended fiscal year, to each of the following:

- A. **capital replacement or purchases**, specify the items and the replacement or purchase schedule including costs and timings.
- B. **future special projects** (tours, promotions, etc.), briefly describe those projects and indicate total projected costs.
- C. **other purposes** (contingency, scholarships, etc.), identify those purposes and total funds designated to each.

Additionally, Edmonton Arts Council Policy states **that if an organization holds an undesignated reserve of funds that exceeds one year's operating expenses for that organization's activities relevant to the grant application, the Jury shall consider the surplus in deciding on grant recommendations for that organization.** Designated surpluses must be itemized according to guidelines set by the Edmonton Arts Council. These guidelines are outlined as A, B, C above. Please note that in accordance with Bylaw 14157 and Policy C211F, support through the City of Edmonton Community Investment Program may be provided to a **maximum of 25% of the applicant's operating budget.**

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Attachment 3 – Festival Statistics

Please complete Attachment 3 even if this information is included in section IV, 1, i-xii.

Number of Volunteers	
Number of Volunteers hours	
Total paid attendance	
Total free attendance	
Number of free events	
Number of free event hours	
Average ticket price	
Minimum ticket price	
Maximum ticket price	
Total number of artists employed/contracted	
Total number of artists who live in the greater Edmonton area	
Total number of full time, year round employees	
Total number of full time, seasonal employees	
Total number of part time, year round employees	
Total number of part time, seasonal employees	
Total number of short term contracts	
Total number of employees who live in the greater Edmonton area	
Projected attendance for upcoming festival	

Community Investment Program Festival Operating Grant

Eligibility:

To be eligible for a Community Investment Program Festival Operating Grant, an organization must be:

- a non-profit society that has been registered as a non-profit society for at least one year
- planning to produce a festival within the corporate limits of the City of Edmonton in 2010.

Additionally, the main purpose of the festival must be the celebration of some theme of interest and appeal to the general public, have predetermined opening and closing dates, and have an obvious presence in the community. Organizations in arrears with the City of Edmonton at the date of application are not eligible for funding through the Community Investment Program.

Evaluation criteria:

All applications will be evaluated by a Festival Peer Jury appointed by the Edmonton Arts Council. This jury will make recommendations to the Board of Directors of the Edmonton Arts Council who will then make 2010 Festival Operating Community Investment Grant recommendations to the City of Edmonton.

The Festival Peer Jury will base their grant recommendations on their assessment of the proven or potential merit of the festival. In determining merit, the Jury will use factors identified in the City of Edmonton Policy which underlies this program. Those factors are:

1. Innovative program development by the applicant
2. Extent to which the festival contributes to the cultural development of Edmonton
3. The applicant's proven track record in program delivery. A comparison of actual festivals produced in previous years to festivals proposed in previous grant applications will be made
4. Extent to which an applicant's revenue is derived from multiple sources to create a stable funding base
5. Evidence of sound fiscal management and financial performance of the applicant
6. Economic impact of the festival, i.e. dollars spent in the community, number of staff hired
7. Attendance as a measure of public support relative to the scope of the festival
8. Extent to which the festival caters to a broad audience
9. Extent to which activities are undertaken to attract tourists to the festival
10. Extent to which the applicant will assure an appropriate measure of public access. Consideration will be given to free events vs. ticketed events and ticket price
11. Extent to which various forms of media were utilized in the previous year including local, provincial and national
12. Extent to which the applicant has established partnership initiatives and is reaching out to form new alliances
13. Extent to which there is opportunity for volunteers to participate in organizing and implementing the festival
14. Extent to which the festival benefits the not-for-profit sector through nurturing and stimulating other non-profit groups
15. Extent to which the festival enhances the quality of life by offering opportunities for Edmonton residents
16. Initiatives taken by the applicant to accommodate participation by those persons with disabilities

Please note that in accordance with Bylaw 14157 and Policy C211F, support through the City of Edmonton Community Investment Program may be provided to a **maximum of 25% of the applicant's operating budget.**

Tips

Attend a workshop

The EAC offers an information session/workshop on the grant application and grant review process to applicants of this program. Please call Sally Kim 780-424-2787 xt226 to arrange an individual appointment.

Be clear and concise

Remember, this is an operating grant — we want to know who you are, what your organization has been doing and what your organization is planning to do. For example, if you've introduced green practices at your festival, describe the changes to your festival and the impact on your volunteers, patrons and artists.

The EAC Peer Juries wish to recognize organizations that submit clear, informative, accurate grant applications. The Jury may, at its discretion, award an additional \$100 to the organization who submits the best grant application.

Ensure financial information is in order

- Your organization's reviewed financial statement must correspond to Column 1 (Last Fiscal Year Actual) in Attachment I of the application.
- Additionally, your organization's grant request as indicated on the front page of the application form must match your budgeted grant request in Attachment I.

Follow Guidelines

- Applicants are asked to refrain from using any covers, binders, staples or paper clips.
- Applications should be submitted on 8 1/2 x 11 paper, single-sided with at least 1" margins in 12-point font.
- If the applicant requires the return of supporting materials such as videos or CDs, please enclose a self-addressed postage-paid envelope.

Frequently Asked Questions

What is an operating grant?

Festival producing organizations incur certain costs in their day-to-day running including administration expenses, marketing and promotional expenses and other expenses associated with the production of the festival. This grant is meant to support those day-to-day expenses.

How will my application be evaluated?

Applications are considered by a jury who will make its assessment based on the 16 factors listed above. The jury will also consider the organization's historical funding levels, growth and grant request.

When will I know the results of my application?

The jury aims to have grant recommendations approved by the Edmonton Arts Council Board of Directors by mid-February. You will be notified of the grant recommendation at that time and given 10 days in which to appeal the jury recommendation. Once the appeal process is complete, Edmonton City Council must approve the recommendations. Cheques are normally in the mail by the end of March.

Where does the funding come from and how much is available?

The Edmonton Arts Council manages the City of Edmonton arts and festival operating grants through the Community Investment Program. The City of Edmonton allocates funding from its tax base to the EAC on an annual basis to support this program. In 2009, \$1,107,023 was allocated to 34 festival organizations. The City of Edmonton's final budget decisions for 2010 will be made in December.

If you have questions regarding the application or the grant process, call Sally Kim at 780-424-2787 xt226 or email skim@edmontonarts.ab.ca