

## **Operating Grant Program Guidelines 2018**

**Deadline: February 16, 2018, 4:30pm MST**

**Applications Open: January 2, 2018**

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### **Program Goal**

The goal of the Operating Grant Program is to ensure that Calgary arts organizations have the opportunity to excel and strategically achieve their mandates with a stable base of resources.

### **Program Description**

The Operating Grant Program invests annually in non-profit organizations with year-round, arts-driven operations, prioritizing organizations that demonstrate high artistic impact, public impact and organizational resiliency. Organizations may allocate these funds to any areas of their overall budgets.

### **Changes to the Operating Grant Program in 2018**

The competitive process applied in the 2016 Operating Grant Program will become renewed this year with the following adjustments:

- Organizations that received operational funding of \$3,000 or less will receive at least the same amount as their 2017 grant in 2018 and 2019, and will be eligible to compete for more funding.

- Organizations that received funding of more than \$3,000 in 2016 and 2017 will receive at least 90% of their 2017 grant in 2018 and 2019. These organizations (along with those that received \$3,000 or less in 2017) will compete for more funding from the remaining 10%, as well as any additional funds available.

**The following new changes will also be in place for 2018:**

- The Organization Opportunity Grant will be discontinued and its recipients integrated into the Operating Grant.
- Organizations that received operational funding through the Organization Opportunity Grant in 2016 and 2017 must apply to the 2018 Operating Grant into an eligible stream of their choice.
- Granting amounts from the Organization Opportunity Grant will carry forward into the 2018 Operating Grant, subject to the guidelines described here.

**Applicants not funded through the Operating Grant or the Organization Opportunity Grant in 2016 will not be eligible to apply in 2018.**

## Eligibility

To be eligible for all Operating Grant streams, an organization must:

- Operate under an arts mandate.
- Be registered as a non-profit organization, corporation or society in the Province of Alberta.
- Have been in operation for one full year.
- Maintain operations throughout the whole or majority of the year.
- Maintain a significant amount of activities that support Calgary artists or are accessible to Calgary citizens.

Calgary Arts Development staff review all applications for eligibility. For organizations that also have non-arts-related programming or operate in areas outside of Calgary, Calgary Arts Development will determine eligibility through the organization's commitment to the arts and the scope of its activities within Calgary's arts community.

The following groups are ineligible for funding through the Operating Grant Program:

- Political, trade union or fraternal lodge organizations.
- Degree- and diploma-granting educational institutes such as colleges and universities.
- Organizations that receive operational funding directly from The City of Calgary.

## 2018 Operating Grant Streams

Applicants are encouraged to select the stream that best fits their organization's mandate, regardless of precedent or current placement. Calgary Arts Development staff will review all applications for eligibility in their selected streams.

### **Community (All, Music)**

Arts organizations that primarily support, present or produce the work of non-professional artists or volunteer professional artists. Organizations that *do not* intend to provide standard professional artist fees should apply to this stream.

### **Professional (Presenting, Performing All, Performing Theatre)**

Arts organizations that present or produce the work of professional artists<sup>1</sup> (whether emerging or established), and either provide or intend to provide standard professional artist fees. Organizations that run festivals *in addition* to their core programming should apply to this stream.

Organizations applying to this stream that are not currently able to offer standard professional artist fees will have to present a clear plan to do so, as well as demonstrate a level of professionalism in organizational and artistic practices appropriate to their discipline.

### **Arts Service Organizations**

Organizations primarily focused on the support of artists, arts organizations or artistic practice (separate from the creation of work).

### **Festivals**

Arts organizations primarily focused on presenting a standalone arts festival. This program defines "festivals" as a special event that occurs within a limited period of time that presents a multi-faceted, broad-based, celebratory experience with activities that are inclusive and accessible.

**Please contact Community Investment staff for guidance on the appropriate stream or if your organization is considering switching to a different stream than in 2016.**

## How to Apply

Eligible organizations must apply using their online granting interface account via Calgary Arts Development's grant interface. If you have any questions about how to access your organization's account, please contact us at [grants@calgaryartsdevelopment.com](mailto:grants@calgaryartsdevelopment.com) or 403.476.2031.

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<sup>1</sup> "A professional artist has specialized training in his or her artistic field (not necessarily obtained in an academic institution); is recognized as such by his or her peers (artists working in the same artistic tradition); is committed to devoting more time to artistic activity if this becomes financially feasible; and has a history of public presentation." (Canada Council for the Arts)

The application process will be available January 2, 2018 through our online grant interface. All applications must be submitted through the online granting interface by **February 16, 2018 at 4:30pm MST**. If a deadline extension is required, Calgary Arts Development must receive a written request before this deadline. Consult the Deadline Extension Policy below for more information.

## Assessment Process

Applicants will be assessed within the context of each organization's arts mandate. An independent, arm's-length assessment committee made up of artistic peers<sup>2</sup> and community members<sup>3</sup> will consider the applicant's plans for the year in which they are applying, and their achievements in the previous year.

Assessment criteria for the 2018 Operating Grant are **Artistic Impact**<sup>4</sup>, **Public Impact**<sup>5</sup> and **Organizational Resiliency**<sup>6</sup>. While all three criteria are important for all granting streams, note that:

- For the **Professional** and **Arts Service Organization** streams, **Artistic Impact** is weighed more heavily than Public Impact.
- For the **Community** and **Festival** streams, **Public Impact** is weighted more heavily than Artistic Impact.

Please refer to the **Assessment Committee Terms of Reference** for further information about the assessment process.

## Application Checklist

- Organization Information** (applicant contact information, organization mandate).
- 2018 Standard Programming List** (XLX, XLXS)
- 2018 Standard Statistical Form** (XLX, XLXS) Applicants to Arts Services, Festivals, Professional Presenting, Professional Performing All and Professional Performing Theatre may submit CADAC statistical forms).

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<sup>2</sup> Artists and arts professionals who possess professional experience and knowledge directly relevant to the arts sector.

<sup>3</sup> Calgarians with an appreciation for the arts (any discipline) that actively take part in arts activities.

<sup>4</sup> The quality of an organization's artistic programming and artistic operations.

<sup>5</sup> The quality of an organization's public engagement and participation. "Public" is defined as a community impacted by the organization, including audience, artists, arts professionals and volunteers.

<sup>6</sup> The ability of an organization to deliver on its mandate as indicated by the organization's practices in governance, financial management, planning and marketing.

- Artistic Impact** (typed directly into the application form). Demonstrate a critical self-awareness and show what you have learned through both success and failure:
  1. Describe what is compelling about the artistic experiences you provide (max 200 words).
  2. How do your artistic activities contribute to your artistic discipline as a whole? What role does your organization play in the local, regional and national arts communities to which it belongs (max 200 words)?
  3. What are your organization's short- and long-term artistic aspirations (max 200 words)?
- Public Impact** (typed directly into the application form). Demonstrate a critical self-awareness and show what you have learned through both success and failure:
  1. How does your organization interact with the public (max 200 words)?
  2. What role do you see your organization playing in fostering creativity in Calgary's communities? Consider the specific communities you work in and Calgary as a whole (max 200 words).
  3. What are your organization's short- and long-term aspirations for public impact (max 200 words)?
- Organizational Resiliency** (typed directly into the application form). Demonstrate a critical self-awareness and show what you have learned through both success and failure:
  1. What current conditions, either internal or external to your organization, allow you to achieve and sustain your mandate? What have you done to help create those conditions (max 200 words)?
  2. What constraints are there, if any, to achieving and sustaining your mandate? How is your organization addressing those constraints (max 200 words)? (Keep in mind that this question is meant to show your awareness of challenges, not punish you for having them).
  3. What are the conditions necessary to achieve your artistic and public impact aspirations (as you've described above)? What is your organization's plan to help ensure that these conditions exist (max 200 words)?
- Statement of Resiliency** (only applicable to organizations flagged for resiliency in 2016 and/or 2017, see the Fair Notice Policy section below).
- 2018 Standard Financial Form** (XLX, XLXS) Applicants to Arts Services, Festivals, Professional Presenting, Professional Performing All and Professional Performing Theatre may submit CADAC financial forms).
- Most Recent Financial Statements:** Applicants must include a Statement of Operations, Balance Sheet, and two years of comparisons. If audited financial statements are unavailable, applicants must include the signatures of two board members not involved in creating the statements (PDF files only).

- Your organization's most recent **strategic plan** (optional, DOC, DOCX, or PDF only).
- Organizational Structure** (uploaded in DOC, DOCX, or PDF formats only).
- List of Board Members** (can be uploaded in DOC, DOCX, or PDF format, or through the **standard form**).
- Support Materials:** Provide materials that relate to your application such as text, digital images, audio or video. Limit your support material to a maximum review time of 10 minutes, or 10 pages of text. You may include up to four attachments with a maximum size of 1MB each. Please provide short descriptions of each attachment in the fields provided. Acceptable file formats are PDF, JPG, DOC, DOCX, XLS, and XLSX. For audio and video materials, please enter a YouTube or Vimeo link with specific instructions on which sections to view.
- Certificate of Accuracy**

## Fair Notice Policy

This policy ensures that organizations that receive annual funding from Calgary Arts Development do not see major fluctuations in their grants in any single assessment year. This policy also limits an assessment panel's ability to remove an organization from the program or significantly decrease an organization's Operating Grant without notice. It also creates a platform to measure and record risks within the Operating Grant Program's portfolio of investments and encourages grant recipients to work with Calgary Arts Development to create strategies and remedy high-risk conditions.

In addition to the assessment process described above, Calgary Arts Development staff and assessors will review applications to ensure that there are no significant risks to an organization's resiliency. Identified risks may result in a resiliency flag and open the organization to reductions to grant amounts as outlined in the **Fair Notice Policy**.

## Organizations Flagged in 2016 or 2017

All organizations flagged in 2016 or 2017 met with Calgary Arts Development staff and received notes outlining resiliency concerns or provided a written response outlining resiliency concerns and responses. (Contact Calgary Arts Development staff if your organization requires a copy of these notes.) **Flagged organizations must provide an update on these resiliency concerns as part of their 2018 application in the Statement of Resiliency section.** The **Fair Notice Policy** addresses ongoing resiliency concerns.

## Notification and Results

Applicants will be notified of the results of their applications in writing in June 2018.

## Deadline Extension Policy

Calgary Arts Development intends its granting process to be open, fair and transparent.

Calgary Arts Development has a responsibility to the citizens of Calgary to ensure the security and value of their investments.

Within one week of the grant application deadline, Calgary Arts Development staff will contact existing clients who have not started their applications to remind them of the deadline. If contact information is out of date, staff will use their best efforts to find correct contact information.

Within two days of the grant application deadline, Calgary Arts Development staff will contact existing clients who have not started applications or who have not submitted applications.

For clients who intend to submit applications but will miss the deadline, a written request for extension must be received by Calgary Arts Development before the deadline.

Requests not received in time will result in ineligibility for that granting year. The request must state the reason(s) the application deadline cannot be met. Acceptable reasons may include:

- Personal health or family crisis
- Birth or death of a family member
- Unforeseen organizational priority
- Recent personnel change related to the organization's internal grant application process and capacity

Calgary Arts Development staff will review the request for extension. If in Calgary Arts Development's sole discretion the reason for the extension is compelling, a deadline extension will be granted. A written notice explaining Calgary Arts Development's decision will be sent to the applicant. Extensions will only be granted if doing so will not materially affect the planned assessment process.

If no application has been submitted and if no request for extension has been approved or received, the client will be ineligible for that granting year and will be considered a new applicant in the subsequent granting year.

Notwithstanding the foregoing, Calgary Arts Development, in its sole discretion, may grant an extension in extenuating circumstances.

## Questions

Consult the **Investment Program FAQ** for answers to common questions about the program.

Our team is here to support you! If you have any questions about the program contact the Community Investment team at [grants@calgaryartsdevelopment.com](mailto:grants@calgaryartsdevelopment.com) or 403.476.2031.