

COMMUNITY DEVELOPMENT PROGRAM – FESTIVALS SECTOR General Granting Purpose and Eligibility

PREAMBLE

The Shevchenko Foundation is a national, chartered philanthropic institution dedicated to the preservation, promotion and development of Ukrainian Canadian cultural heritage, and to the advancement of a flourishing Ukrainian community for the enrichment of Canada. The Foundation respects the past, celebrates the present and promotes the future of the Ukrainian community in Canada with inclusiveness, integrity, sustainability, spirit, excellence, creativity and innovation as its core values.

COMMUNITY STEWARDSHIP

The Shevchenko Foundation fulfills its mandate by disbursing grants in support of various initiatives that assist groups and individuals in the four pillars of Arts, Education, Community Development, and Heritage.

The Shevchenko Foundation's grant-giving stewardship extends priority to projects and programs that:

- Contribute to enriching the Canadian experience with the beauty, passion, and diversity of Ukrainian Canadian culture;
- Contribute to strengthening the Ukrainian community in Canada;
- Share Ukrainian Canadian cultural contributions with a broad and diverse public on a community, regional or national level;
- Exhibit financial capability to undertake and sustain the project and/or program within the boundaries of a business plan, either as an organization or an individual;
- Employ new technologies and partnership models on how Ukrainian Canadian cultural heritage is created, produced, disseminated, and preserved.

ASSESSMENT

The Shevchenko Foundation's assessment for grant-giving is guided by integrity, sustainability, excellence, innovation, and inclusiveness of all Canadians who support the mandate of the Shevchenko Foundation.

When assessing applications, the Foundation uses the following questions.

- Are the goals for the project well-articulated?
- Are the skills of those undertaking the project to completion well-articulated?
- Are the goals for the project within the scope and mission of the Shevchenko Foundation?
- How does the project advance the relevancy of Ukrainian cultural heritage to the enrichment of Canada?
- How well does the project demonstrate an understanding of present-day industry standards of excellence and public engagement in corresponding to the appropriate pillar of Arts, Heritage, Community Development, or Education?
- What is the value-added contribution of this project that distinguishes it beyond existing Ukrainian cultural heritage content and similar activities?
- Is there a sound marketing and distribution plan that articulates accommodating changing demographics, changing patterns of consumption, changing forms of dissemination?
- Are the indicators for success of the project within the organizational and human resources capacity of the applicant?

Assessment continued on next page

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- How convincing is the financial viability of the project?
 - What are the consequences and contingencies for project shortfalls? How will the project still be viable if it does not receive the projected revenues in grant support and public support?
 - Is there evidence of sound fiscal management, a track record of fiscal responsibility, and sound budgeting?
 - How realistic are budget revenue projections? Are cost estimates well researched?
 - Are ticket sales and fundraising targets within the scope of past performance and similar market realities?
 - What is the demonstrated value of funding a project application if it does not generate earned revenue from ticket sales or other earned revenue streams?

PURPOSE

The Shevchenko Foundation believes Festivals:

- Creatively and imaginatively engage large and diverse audiences, and increase opportunities to share the Ukrainian Canadian experience for broad public access
- Play a distinctive role in developing a vibrant and sustainable arts profile at a local level
- Engage and integrate valuable contributions of volunteers in developing and sustaining festivals

ELIGIBILITY

- Applicant must be an organization registered as a not-for-profit society governed by a board of directors or a body responsible for the organization.
- To be eligible for a Community Development Programs Festivals Grant, your event must:
 1. Celebrate, in whole or in part, a Ukrainian Canadian theme of interest and appeal to the general public, i.e. not of interest and appeal solely to members or associates of the organization.
 2. Have pre-determined opening and closing dates.
 3. Must foster a sense of community identity and fellowship in your community. This should include:
 - Offering artistic and cultural opportunities for residents of your community, province, and from elsewhere in Canada,
 - Contributing to the Ukrainian Canadian arts and cultural development of your community, province, and Canada,
 - Demonstrating a commitment and the capacity to maximize public engagement through participation and audience attendance,

Eligibility criteria continued on next page

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- Providing opportunities and training for volunteers to participate in organizing and implementing the festival
 - Cultivating ongoing integration of local resources and developing new partnership initiatives and relationships with business, Ukrainian Canadian community organizations and other non-profits
4. Must prove sound management of the organization. This will include:
- Demonstrated fiscal responsibility and financial performance
 - Initiative and success in developing diverse sources of revenue, including earned revenue from attendees
 - A sound marketing and distribution plan that articulates accommodating changing demographics, changing patterns of consumption, and changing forms of dissemination, including the extent to which various forms of digital media are effectively used.
5. The festival must recognize and acknowledge the financial support of the Shevchenko Foundation. It is mandatory, and subject to monitoring, that the Shevchenko Foundation logo appears in all non-exclusive promotional and marketing material, including media communications, posters, festival programs, your website, and your social media pages. Failure to do so can result in a review of future funding.
6. In the event that representatives of the Shevchenko Foundation are present at your festival, all of the following are expected:
- Acknowledgement through public announcement
 - Invitation to attend any VIP or opening reception
 - Provision for a promotional booth or space for Shevchenko Foundation
 - Complimentary passes to the festival and festival events

Priority will be given to festivals that can demonstrate their feasibility by providing a best-practice model for the delivery of all stages of the festival, can provide evidence of realistic budgets, and can provide evidence of financial and/or in-kind supports from other sources.

Not eligible through this Program are:

- Sporting events, conferences or trade events, or events with a predominantly promotional or commercial component.
- Adjudication and prize costs associated with competitive festivals.

Deadlines for Community Development Program – Festival Sector grant applications are:

- **April 1 for festivals held between September 1 and January 31**
- **October 1 for festivals held between February 1 and August 31**

COMMUNITY DEVELOPMENT PROGRAM – FESTIVALS SECTOR

Grant Application Form PART ONE

Please contact our office toll-free at 1-866-524-5314 or email us at grants@shevchenkofoundation.ca if you have any questions or require assistance with your application.

Name of Festival _____

Festival Dates _____

Primary Location of Festival _____

Amount requested _____

Legal Name of Organization _____

Mailing Address (office/headquarters) _____

City _____ Province _____ Postal Code _____

Telephone _____ Website _____

Name of Primary Contact _____

Title _____

Email _____ Telephone _____

Name of President/Chairperson _____

Email _____ Telephone _____

What year was your organization founded? _____

Is your organization incorporated? Yes No Date of incorporation _____

Are you a non-profit organization? Yes No Charitable # _____

Have you received funding from Shevchenko Foundation in previous years? ____ YES ____ NO

If YES, please note that no new application will be accepted if a Final Report has not been filed from a previous grant.

For Internal Use Only: Grant File # _____	Client # _____
Date Application Received _____	Amount Approved \$ _____
Date Approved _____	Date Final Report Rcvd _____

COMMUNITY DEVELOPMENT PROGRAM – FESTIVALS SECTOR

Grant Application Form PART TWO

NOTE: The information in the narrative of the upcoming festival, plus Attachments 1 and 2, serve as your GRANT FINAL REPORT for your previous year's grant.

All applicants must include the following information in this sequential order. This information is mandatory. Applications will be assessed on the Eligibility and Criteria listed above.

A narrative of the upcoming festival that describes, (where applicable):

- a. The festival purpose in 20 words or less.
- b. The festival mission and vision statements, if available.
- c. For the upcoming festival, describe the core program content, any new initiatives or programs that are being planned, and the expected outcomes.
- d. If the festival was produced in the previous year, provide an evaluation of the outcomes of the festival. Was there any difference between the planned elements of that year's festival and what actually happened?
- e. The artistic and cultural benefits of the festival to the Ukrainian Canadian community, and to the non-Ukrainian Canadian community at large.
- f. Provide a rationale if your festival has chosen not to produce revenue from admissions or ticketed components. How is this exclusion offset by other revenue components to lead to a non-deficit position?
- g. An analysis of the marketing strategy and intended audience of the festival and any activities to increase engagement and participation of attendees to your festival.
- h. Any collaborative or cooperative partnerships or ventures with other businesses or not-for-profit organizations, in particular Ukrainian Canadian businesses and not-for-profit organizations.
- i. The organization's volunteer program. Describe the tasks undertaken by volunteers as well as methods used to recruit, train and recognize volunteers.

2. A description of major changes, if any, in the organization in the past year (if applicable). This includes significant changes in financial operations or organizational structure. If your grant request is an increase over the previous year, provide a short explanation.

3. A completed Attachment 1 – Festival Statistics for the Previous Year

4. A summary of the organization's financial activities:

- a. Provide the most recent audited financial statements, including Balance Sheet and Statement of Revenues and Expenses as presented to the members of your organization at the most recent AGM.
- b. Provide the most recent monthly or quarterly financial statement, including Balance Sheet and Statement of Revenues and Expenses.

5. A completed Attachment 2 – Financial Information Form

6. A short narrative on your financial surplus or deficit. Based on the information provided in Box F of Attachment 2 – Financial Information Form, provide a short explanation of how you cover your deficit, or what you do with your surplus.

Grant Application PART TWO continued on next page

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Grant Application Form PART TWO continued**

7. **A list of the current Board of Directors**
8. **By-laws of your organization**
9. **Attach examples of, and links to, recognition of the support of Shevchenko Foundation in traditional media, social media or promotional materials from the last festival, unless you are a new applicant**
10. **Attach your most recent Annual Report**

CANADA REVENUE AGENCY

Individuals and organizations who do not have their own charitable number as defined by the Canada Revenue Agency (CRA) may be subject to participation in an Agency Agreement with the Shevchenko Foundation. The Agency Agreement documents the disbursement of funding, the roles and responsibilities of the individuals or organization receiving funding, and the monitoring and reporting procedures. For more information, please take the time to read the [Government of Canada Charities Policies and Guidance Document](#).

Please e-mail this registration form along with your completed application as ONE PDF DOCUMENT to grants@shevchenkofoundation.ca

You are welcome to contact our office toll-free at 1-866-524-5314 if you have any questions or require assistance with your application.

**COMMUNITY DEVELOPMENT PROGRAM – FESTIVALS SECTOR
ATTACHMENT 1 – Festival Statistics for Previous Year**

PREVIOUS FESTIVAL	
Number of volunteers (include unpaid artists)	
Number of volunteer hours	
Total paid attendance	
Total free attendance	
Number of free events	
Minimum ticket/admission price	
Maximum ticket/admission price	
ARTISTS/PERFORMERS	
Total number of artists/performers contracted (paid)	
Total number of artists/performers contracted who live in your province	
Total number of artists/performers contracted who live outside your province	
Total number of artists/performers contracted who live outside Canada	
Total number of unpaid artists/performers	
OTHER PERSONS EMPLOYED OR CONTRACTED	
Total number of full-time and part-time employees	
Total number of employed contractors (eg: stage, sound and lighting, cleaning, etc.)	
VENDORS	
Total number of Ukrainian themed art, craft, or other vendors	
Total number of non-Ukrainian themed art, craft, or other vendors	
Minimum/maximum vending space price	
UPCOMING FESTIVAL	
Total projected attendance	
Total projected volunteers	
Total projected artists/performers contracted and unpaid	
Total projected vendors (Ukrainian and non-Ukrainian themed)	

**COMMUNITY DEVELOPMENT PROGRAM – FESTIVALS SECTOR
ATTACHMENT 2 – Financial Information Form**

Please indicate the month/day/year of the applicable fiscal year at the top of each column.

A) Earned Revenue	Last Fiscal Year MM/DD/YYYY	Current Fiscal Year Projections MM/DD/YYYY	Next Fiscal Year Budget MM/DD/YYYY
Ticket sales/admissions			
Bar/concessions/vendor booths			
Advertising			
Other (specify)			
Total Earned Revenue			

B) Fundraising	Last Fiscal Year MM/DD/YYYY	Current Fiscal Year Projections MM/DD/YYYY	Next Fiscal Year Budget MM/DD/YYYY
Shevchenko Foundation grants			
Government grants:			
1.			
2.			
3.			
Other grants:			
1.			
2.			
3.			
4.			
Fundraising activities			
In Kind contributions			
Other (specify)			
Total Fundraising			

C) Other Income	Last Fiscal Year MM/DD/YYYY	Current Fiscal Year Projections MM/DD/YYYY	Next Fiscal Year Budget MM/DD/YYYY
Other (specify)			
Total Other Income			

Financial Information Form continued on next page

**COMMUNITY DEVELOPMENT PROGRAM – FESTIVALS SECTOR
ATTACHMENT 2 – Financial Information Form continued**

D) Total Revenue	Last Fiscal Year MM/DD/YYYY	Current Fiscal Year Projections MM/DD/YYYY	Next Fiscal Year Budget MM/DD/YYYY
A+B+C			

E) Expenses	Last Fiscal Year MM/DD/YYYY	Current Fiscal Year Projections MM/DD/YYYY	Next Fiscal Year Budget MM/DD/YYYY
Artist and Performer Fees/Salaries/Honoraria			
Production/Exhibition (eg. stage, tents, sound, etc.)			
Volunteers			
Marketing and Promotion			
Administration/Management Salaries			
Office Rent			
Office Materials and Equipment			
Fundraising			
Other (specify)			
Total Expenses			

F) Summary	Last Fiscal Year MM/DD/YYYY	Current Fiscal Year Projections MM/DD/YYYY	Next Fiscal Year Budget MM/DD/YYYY
Total Revenue (Box D)			
Total Expenses (Box E)			
Surplus/deficit			

**COMMUNITY DEVELOPMENT PROGRAM – FESTIVALS SECTOR
Grant Application Form PART THREE**

DECLARATION:

- We have read the Purpose, Eligibility, and Criteria of the Shevchenko Foundation Community Development – Festivals Sector Program.
- We accept the conditions of this program and agree to abide by the decision of the Shevchenko Foundation.
- We confirm that our organization has policies and protocols in place that comply with children and youth (under 18) protection policies and procedures in our jurisdiction.
- We confirm our organization is in full compliance with the directives of the CRA, and with annual corporate filings per provincial requirements. Does not apply.
- We understand that the Shevchenko Foundation is subject to the Freedom of Information and Protection of Privacy Act and the above information is protected under the Act.
- We confirm that the statements in this application are true.
- In the event of receiving a grant from the Shevchenko Foundation we accept the acknowledgement conditions outlined in Item 4 of the Criteria.

Print Name

Print Name

Signature (President)

Signature (Treasurer/Secretary)

Date Signed _____

APPLICATION CHECKLIST:

- ___ Completed Application Form: Part 1
- ___ All information requested in Application Form: Part 2, with attachments.
- ___ Completed and signed Application Form: Part 3 – Declaration
- ___ Attachment 1 – Festival Statistics For Previous Year
- ___ Attachment 2 – Financial Information Form