



Calgary Arts Development (CADA) 2012 Cultural Space Investment Process (CSIP) Project Proposal Requirements

This is a sample of the online proposal. The online proposal application will be available on December 2nd, 2011. Visit CalgaryArtsDevelopment.com/CSIP to access the online application.

DEADLINE: 4:30 PM, FEBRUARY 1st, 2012

Cultural Space Investment Process (CSIP) is NOT a capital funding program but is a required identification and assessment step for a project to be considered for municipal funding. Applicants submitting a project proposal must have previously submitted a Letter of Intent, which has been pre-approved for the 2012 CSIP program. Please be sure to review the CSIP Guidelines, available online at CalgaryArtsDevelopment.com/CSIP, before submitting a project proposal.

CHECKLIST OF REQUIRED INFORMATION

1. Contact Information
 - Certificate of Accuracy
2. Project Synopsis
3. Project Eligibility
4. Project Vision and Organizational Alignment
5. Opportunity and Demonstration of Need
 - Supporting documentation
6. Organizational Stability and Resiliency
 - Project Principals form with resumes
 - Most recent signed Financial Statements
 - Board List with resumes
 - Organizational Chart
7. Strategic Alignment with City of Calgary Policy
8. Detailed Project Description
 - Supporting graphic information / images (optional)
 - Project Budget
 - Project Funding Document

- Project Schedule
 - Operational plans (required)
 - Evidence of Support from Stakeholders (optional)
9. Verbal Presentation (included as information to applicants)
10. Additional Attachments (optional)

1. CONTACT INFORMATION

- Organization Information – Name, mailing address, phone, fax, e-mail, and web address.
- Applicant Information – Information for the person who is the primary contact for the project.
- Information for person entering data, if different from above
- Certificate of Accuracy – Statement to be signed by the organization's Board Chair and then uploaded to the online proposal form. Download the required form from CalgaryArtsDevelopment.com/CSIP.

2. PROJECT SYNOPSIS

- I. Project Archetype – Select the space archetype that best describes the project. Download the Arts Spaces Strategy and Capital Plan, pp 12-16 at CalgaryArtsDevelopment.com/CSIP, for detailed definitions of each of the archetypes below.
 - Archetype 1: Cultural Cluster Anchor Space
 - Archetype 2: Cultural Cluster Incubator Space
 - Archetype 3: Major Community Arts Centre
 - Archetype 4: Small Community Arts Centre

- II. Project Type – Select the option that best describes the project (select one).
 - Facility Development: A stand-alone culture related infrastructure project.
 - Facility Enhancement: Portions of larger capital projects that create or renovate purpose-built arts and/or cultural spaces.

- III. Project Stage – Select the phase that best describes the project (select one).
 - Concept Phase: An idea or general requirement has been identified.
 - Planning Phase: High level details regarding funding location, requirements, or site planning is underway or complete and pending approval to proceed to design.
 - Design Phase: Detailed design work or determination of specifications is underway.
 - Construction / Implementation: Project can proceed immediately as soon as funding is approved.

- IV. Project Site/Address – Specific address or potential neighborhood/area, if known.

- V. Project Size – Square footage of cultural / arts facility only (a range is acceptable).

- VI. Total Project Budget – Provide a total of the entire project budget (one number).

- VII. Project Funding Summary – Complete the chart below regarding the project's confirmed or pending funding sources. Specify the names of all the government funding programs, private/corporate sponsors, or other funding sources that apply. If donors prefer to remain anonymous please state "Anonymous" in this field.

- Federal
 - Provincial
 - Municipal
 - Private
 - Other
- Specific request through CSIP:
- Amount
 - Cash / Land / Both

VIII. Summary of Project (max. 500 characters)

3. PROJECT ELIGIBILITY

- I. Does the project meet The City of Calgary's definition of culture-related infrastructure? Refer to the MSI Guidelines for the approved categories (page 20), available for download at CalgaryArtsDevelopment.com. Yes/ no
 - If no, please discuss (max 1000 characters).
- II. Is the project within the Calgary city limits? Yes/ no
 - If no, please discuss. (max 1000 characters).
- III. Has the project previously received support from The City of Calgary of more than 35% of the total project costs? Yes/ no
 - If no, please discuss. (max 1000 characters).
- IV. Will there be ongoing public access to the project? Yes/ no
 - If no, please discuss. (max 1000 characters).

4. PROJECT VISION AND ORGANIZATIONAL ALIGNMENT

Describe the organization's vision for this project and how it aligns with the organization's mission (max. 1000 characters).

5. OPPORTUNITY AND DEMONSTRATION OF NEED

- I. Describe and substantiate the need for this project (max. 1000 characters).
- II. Upload any supporting documentation regarding need and / or opportunity, if available. (max 5 megabytes).
- III. Describe project urgency, if applicable (max. 1000 characters).
- IV. Describe any unique opportunity that this project addresses, if applicable (max. 1000 characters).
- V. Describe other market alternatives or competition to this project (max. 1000 characters).
- VI. Describe any project innovation (facility or program) (max. 1000 characters).
- VII. Describe any risks that will impact the opportunity identified and/or the need for this project and the organization's planned contingencies (max. 1000 characters).

6. ORGANIZATIONAL STABILITY AND RESILIENCY

Briefly and candidly describe the organization(s) that is/are requesting funding for this project, including board, staff and consultants. Include mandate, vision, history, founding date, board structure, financial

status, previous experience with similar projects, previous fundraising experience, etc. (max 2000 characters)

Upload the following:

- I. Project Principals – Provide as an attachment the completed project principals form available at CalgaryArtsDevelopment.com/CSIP. Include résumés for all known principles together with the completed Project Principals form as one PDF.
- II. Most Recent Financial Statement – Provide as an attachment. If the organization is annually audited, provide the most recent annual financial statement for the organization signed by the auditor(s). If the organization is not annually audited, provide the organization's most recent annual financial statement **reviewed and signed by two board members** who are not directly engaged in the preparation of financial statements. If the project is in partnership with other organizations, provide the financial statements for each organization involved.
- III. Board List – Provide as an attachment or use the standard form available at CalgaryArtsDevelopment.com/CSIP. Include a list of the organization's current Board of Directors, indicating roles and length of service for each director, as well as role on this project. If the project is in partnership with other organizations, provide a board list for each organization involved. Please upload as one PDF file.
- IV. Organizational Structure – Provide as an attachment. Include the staffing structure of the organization, either in chart-form showing reporting relationships, or a description of staff roles and their reporting relationships. Indicate if positions are currently vacant. If the project is in partnership with other organizations, provide the organization structure for each organization involved.

7. STRATEGIC ALIGNMENT WITH CITY OF CALGARY POLICY

- I. Describe how this project aligns with Calgary Cultural Policy. Refer to the Arts Spaces Strategy and Capital Plan available online at CalgaryArtsDevelopment.com/CSIP. (max 1000 characters)
- II. Describe the Social, Environmental and Economic benefits and impacts of this project. Refer to The City of Calgary Triple Bottom Line Policy available online at CalgaryArtsDevelopment.com/CSIP. (max 1000 characters)
- III. Describe how this project aligns with The City of Calgary 2020 Sustainability Direction available online at CalgaryArtsDevelopment.com/CSIP. (max 1000 characters).

8. DETAILED PROJECT DESCRIPTION

- I. Describe the project to be built (max 1000 characters).
 - o Upload information / images that help describe the project. (max 10 megabytes).
- II. Describe any partnerships that the project has formed and the structure of those partnerships (e.g., investor, co-owner, part-owner, leaser, lessee, etc.) (max 1000 characters)
 - o Development of the project – partner(s) and structure of partnership
 - o Ownership of the project – partner(s) and structure of partnership
 - o Operation of the project – partner(s) and structure of partnership
- III. Describe all potential users of the project (e.g., casual renter, primary tenant, multi-year leaser, etc.) and percentage used by the following groups: (max 1000 characters)

- Applicant organization(s) or group – user, type of use, % of total space
 - Individual artists – user, type of use, % of total space
 - Other arts organizations – user, type of use, % of total space
 - Community users – user, type of use, % of total space
 - Other, please define – user, type of use, % of total space
- IV. Describe entire project budget, including land acquisition, design fees, construction costs, contractor fees, furnishings, contingencies, etc. Note that there may be a requirement that your project meet LEED™ Gold or Silver. Describe how the project budget was derived. Include all budget-related assumptions, e.g. inflation. (max 1000 characters)
- Upload project budget document. Level of detail to be commensurate with stage of project development.
- V. Describe project funding, including anticipated sources of funding, opportunities to leverage funding through matching grants, etc. (max 1000 characters)
- Upload project funding document. Level of detail to be commensurate with stage of project development.
- VI. Describe the schedule for project funding, design and construction. (max 1000 characters)
- Upload project schedule. Level of detail to be commensurate with stage of project development.
- VII. Describe project operating plans during and post-construction, including lifecycle maintenance, staffing, anticipated revenues and expenses, etc. (max 1000 characters)
- Upload project operating plans. Level of detail to be commensurate with stage of project development.
- VIII. Describe existing and potential project stakeholders. (max 1000 characters)
- Upload evidence of support from stakeholders for the project, if available.
- IX. Describe risks to the viability of this project and the organization's planned contingencies. (max 2000 characters)

9. VERBAL PRESENTATION

All candidates that submit a proposal to CSIP will be required to give a verbal presentation on their project directly to the Assessment Committee. The Assessment Committee is an arms-length committee comprised of citizen volunteers with expertise in developing and operating arts and culture facilities. The presentation will inform the committee's decision when making the final list of recommendations.

It is understood that projects will be at varying stages of planning when they submit a proposal:

- **If your project is at an early stage of planning**, please provide as much detail as possible without exceeding the allotted presentation length. If you do not have information for a project area, please indicate the reasons why no information is available (e.g., as yet undetermined, in process of determining, etc.).
- **If your project is at an advanced stage of planning**, please provide overview responses to the questions below and include supplementary detailed information in the form of attachments. (See the attachment checklist under "Additional Attachments".)

The presentation is intended to provide an overview of the project, including the opportunities presented by the project and the vision that will inform it, as well as the plan and process for completion. In the presentation address the following:

- I. How is your project responsive to your organizational mission and/or strategic plan? Discuss the planned artistic/cultural operations of the completed project. Highlight how the facility will directly benefit the operations and cultural vision of your organization.
- II. How will your project benefit The City of Calgary and all Calgarians in terms of its positive impacts on social, economic and environmental sustainability? Highlight how the project aligns with relevant civic policies and plans (e.g. imagineCalgary, Civic Arts Policy, and Economic Development Strategy).
- III. What are the unique or innovative features of your project? This *may* include:
 - o Elements of your project design – facilities that are currently non-existent in Calgary: public space, adaptive re-use of space, heritage space, commercial space, public art, mixed use, iconic or innovative design, etc.
 - o Elements of your project operations: private partnerships, public partnerships, community support models, funding models, operating models, etc.
 - o Value for money approaches: co-location of facilities, design best practices, coordination with other similar facilities, etc.
 - o Other project elements.
- IV. Does the project have any risks/challenges that could potentially prevent it from reaching its intended vision (these may include financial support, zoning, other City policies or bylaws, finding a location, etc.)? Please describe how you are working to or intend to address these challenges.
- V. Describe or demonstrate your plan to ensure financially stable operations of the completed project, detailing how the project will impact operations (e.g. lifecycle maintenance, staffing, earned revenue) and remain viable over the short to medium term.

10. ADDITIONAL SUPPORTING MATERIALS (as available)

Presenters are encouraged to bring any additional information on their project to the presentation if available. It is recommended that presenters who have projects that are in advanced stages of planning provide the available materials included in this checklist to CADA staff prior to the CSIP deadline:

- Organizational strategic plan
- Business Plan for the operation of the completed project
- Project cash flow forecast
- Project schematic site / building plan
- Complete project schedule / critical path
- Funding / capital campaign feasibility study
- Evidence of demand for project (e.g. survey, research, etc.)
- Environmental impact assessment report
- Letters of support from potential users and other stakeholders
- Publicity material for project

Note: If presenters have additional supporting materials to supply to the committee, they must bring 8 copies of the material with them to the presentation.

Please contact Calgary Arts Development if you have any questions pertaining to this process.

Phone: 403-264-5330, Email: Grants@CalgaryArtsDevelopment.com