

Report to Council



Date: February 1, 2016
File: 0710-20
To: City Manager
From: Sandra Kochan, Cultural Services Manager
Subject: 2016 Professional Operating Grants

Recommendation:

THAT COUNCIL receives, for information, the report dated February 1, 2016 from the Cultural Services Manager;

AND THAT COUNCIL approves the 2016 Professional Operating Grants as recommended in the report dated February 1, 2016 from the Cultural Services Manager, for the following organizations:

- \$62,000 to the Okanagan Symphony Society;
- \$36,000 to the Kelowna Ballet Society;
- \$26,000 to the Okanagan Artists Alternative Association (operating as Alternator Centre for Contemporary Art); and
- \$16,000 to the Bumbershoot Children's Theatre Society

Purpose:

To approve distribution of annual grants-in-aid to professional arts organizations.

Background:

On October 5, 2015, Council approved new guidelines for the 2016 Professional Operating Grants. The guidelines were revised in anticipation of the entrance of new organizations into the program in 2016 and subsequent years.

As part of the 2016 budget, Council also approved an additional \$30,000 for the Professional Operating Grant Program, increasing the amount available for distribution from \$110,000 to \$140,000 annually.

The purpose of these grants is to provide consistent and reliable annual support to professional, established non-profit arts and cultural organizations which deliver impactful, quality programs and services, demonstrate sustainable operations and contribute to the realization of the City's cultural vision, principles and goals.

Eligible organizations in this program are active for at least five years with professional artistic and administrative staff leadership, a proven record of delivering quality artistic programs in the community, an annual cash budget of at least \$200,000, and an active Board of Directors with a clear governance role. Professional artistic contributors must be compensated at standard rates.

In previous years, three organizations participated in this program, with 2015 funding levels indicated:

- Okanagan Symphony - \$55,000
- Ballet Kelowna - \$30,000
- Alternator Centre for Contemporary Art - \$25,000

In 2016, Bumbershoot Children's Theatre is a new entrant into the Professional program.

Representatives of all four organizations included in this report will deliver Public-in-Attendance reports directly to Council in the coming months.

Evaluation process:

Pursuant to the program guidelines, the following process was used to evaluate the 2016 Professional Operating Grants:

- 1) Organizations were asked to complete a standard form Organization Report/Information Request and submit required materials to Cultural Services by December 17, 2015. The report and supplementary materials address the published assessment criteria of:
 - o Planning, Leadership & Administration
 - o Artistic Programs and Services
 - o Participation and Impact
 - o Financial Management
 - o Board and Governance
- 2) Following a review of submitted materials, the Cultural Services Manager meets with the Executive Director or Artistic Director of each organization and a member of the Board or Board Executive. During this meeting, review findings are discussed and clarified. It is also an opportunity to engage in broader dialogue about the health of the sector, trends and how the City of Kelowna can improve its service to the sector.

In the preparation of the recommendations in this report, staff have considered the following factors:

- The organization's previous funding history with the City of Kelowna, including how it has responded to previous feedback or suggestions for improvement
- The review findings and subsequent interview
- The assessment criteria published in the program guidelines

Background information to support the funding recommendation for each organization is contained in Schedules A through D. The following is an overview:

- Okanagan Symphony Orchestra - recommended funding increase from \$55,000 to \$62,000, in recognition of increased community outreach activities (particularly the Symphony's popular offerings during Culture Days), expansion of the Youth Orchestra

and Youth Chorus, and leadership in many collaborative initiatives with other local organizations, including preparatory work for a special Canada 150 collaboration with Ballet Kelowna.

- Ballet Kelowna - recommended funding increase from \$30,000 to \$36,000 to support the company's growth in the Kelowna market, with more local performances, increased operating costs for the new studio space and community outreach and programs made possible through public access to the new studio space.
- Alternator Centre - nominal increase from \$25,000 to \$26,000 to recognize the Centre's continuing work, increased attendance and community programming, including the Skin and Bones experimental music series.
- Bumbershoot Children's Theatre - recommended funding of \$16,000 as a first time Professional Operating Grant is consistent with the City's previous funding for the organization through other programs and provides an opportunity, through staff feedback and improved reporting systems, to advance the organization to the 'next level' of administrative, operating and programming excellence in the coming years.

Upon approval of funding recommendations by Council, staff will provide each organization with a funding confirmation letter which sets out the conditions of funding and may contain feedback or suggestions for improvement from the funder's perspective.

Internal Circulation:

Director, Active Living & Culture Division
Communications Supervisor, Communications & Information Services

Existing Policy:

Council Policy 274 - Cultural Policy

Considerations not applicable to this report:

Legal/Statutory Authority
Legal/Statutory Procedural Requirements
Financial/Budgetary Considerations
Personnel Implications
External Agency/Public Comments
Communications Comments
Alternate Recommendation

Submitted by:

S. Kochan, Cultural Services Manager

Approved for inclusion: J. Gabriel, Director, Active Living & Culture Division

Attached:

Schedule A: Okanagan Symphony Orchestra
Schedule B: Ballet Kelowna
Schedule C: Alternator Centre for Contemporary Art
Schedule D: Bumbershoot Children's Theatre

cc:

Director, Active Living & Culture Division

Communications Supervisor, Communications & Information Services
Executive Director, Okanagan Symphony Society
Artistic Director & CEO, Ballet Kelowna
Artistic and Administrative Director, Alternator Centre for Contemporary Art
Artistic Director, Bumbershoot Children's Theatre

Schedule A: Okanagan Symphony Orchestra
Report from the Cultural Services Manager Feb. 1, 2016

Planning, Leadership & Administration:

2015/16 is the Symphony's 56th season. Music Director Rosemary Thomson's contract has been renewed to August 31, 2019, enabling a continuation of her success in developing orchestral talent, and her leadership in programming, artistic collaborations and audience development.

The three-year collective agreement with 20 core musicians will enter a renewal phase at the conclusion of the 2016 season.

Executive Director Robert Barr has completed his first full year with the organization and has implemented a number of administrative improvements which allow the organization to better track its sales data, donations and sponsorships, budgeting and financial forecasting and basic records.

A new staff position dedicated to education and outreach programs strengthens the coordination of the Symphony's many outreach initiatives, and allows the organization to plan for and manage growth in this area.

The organization is working on a three-year Strategic Plan which will engage both Board and staff. Current priorities are to improve cultivation and stewardship of individual and corporate support, explore ways to expand the audience and refine the organization's data collection and baseline operating model to enhance financial planning.

The Symphony is the largest professional performing arts organization in Kelowna and the third largest professional orchestra in the province. This is a mature organization which has strengthened its administrative team in the last year and has embraced the tasks of improving its operations and thoughtfully planning for the future. Within the management team there is a clear understanding of the organization's operating performance and good alignment between artistic practice and resource management.

Artistic Programs and Services:

As a regional orchestra, the Symphony continues to regularly perform in Vernon, Kelowna and Penticton. Some differences between audiences in each centre calls for a careful approach to planning a performance season and striking a balance between introduction of new work by contemporary Canadian composers and continuing to offer well-known classics.

The current 2015/16 season offers:

- six Masterworks concerts, each featuring renowned guest artists - the finale in May, 2016 will fill the stage with 230 singers, a 60-piece orchestra, two pianos and three vocal soloists
- a Christmas celebration featuring guest vocalist Robert Fine
- a Pops concert featuring guest vocalists and the music of Andrew Lloyd Webber
- performances by the Okanagan Symphony Youth Orchestra
- New for 2016 - a series of quintet performances in Rutland, Summerland, Lake Country and West Kelowna - a pilot project which will help to create direct community connection through lower-priced afternoon performances for primarily older audiences.

More information about community outreach is provided in the next section.

Planning for the next season is in progress, with special collaborations and programming in celebration of Canada's 150th Anniversary.

Participation and Impact:

The organization continues to provide an impressive array of programs and services which engage with and connect to the broader community, and provide significant development opportunities for young musicians. Wherever possible, the experiences for young audiences are participatory. Audiences span all ages from pre-school, elementary school, and middle/high school. Offerings include:

- Symphony Storytime - small ensembles of core and youth players perform in an interactive story-telling setting for approximately 125 children aged three to four each year
- In-School Workshops - 14 workshops with a trio of musicians were attended by approximately 3000 students in Penticton. In addition, in-class trio sessions in Fall 2015 were provided at Mt. Boucherie and Kelowna Secondary School in cooperation with Chamber Music Kelowna.
- Education Concerts - over 3000 students from Kelowna, Penticton and Vernon attend a total of six performances. Student performers are featured (for example, 88 young violinists were part of the 2015 performances). In 2016, 12 young violinists will be the featured soloists for Vivaldi's Four Seasons and will benefit from mentoring by guest artist David Greenberg. Teachers receive a comprehensive study guide to accompany the performances.
- Free Performances at the Library - launching with a packed house during Culture Days, four free Saturday afternoon concerts offer 30 minutes of small ensemble performance followed by a 30-minute instrument 'petting zoo' hosted by members of the Youth Orchestra.
- Youth Choir - six existing high-school choirs from throughout the valley are combined to form a Youth Choir (approximately 200 voices) which rehearses extensively with Rosemary Thomson and the Symphony's adult chorus, and performs with the orchestra. This year's final concert will feature the combined youth and adult choruses in a performance of 'Carmina Burana.'
- Okanagan Symphony Youth Orchestra (OSYO) - since 2013, the OSYO has grown from 25 to 80 young musicians who come from all over the Okanagan Valley. In addition to regular and sectional rehearsals, they have an annual 'side-by-side' performance with the orchestra, two concert weekends where the OSYO performs in Vernon, Kelowna and Penticton, and a rehearsal overnight camp experience to launch the season in early September. A bursary, concerto opportunities and a composition program are also offered.
- The Symphony also offers Master Classes with guest artists, clinics with core musicians, public lectures, open rehearsals, community auditions for the Adult Chorus, pre-concert chats and open dress rehearsals.

Since the 2014/15 season, the Symphony has completed or planned collaborations with Ballet Kelowna, Bumbershoot Children's Theatre, Chamber Music Kelowna, Festivals Kelowna, Glenmore Elementary School, Kelowna Secondary School, Mar Jok Elementary School, Okanagan Regional Library, Opera Kelowna, Rutland Secondary School, SD 23, UBCO and Westbank First Nation.

Total audience for the current 2015/16 season is anticipated to exceed 17,000 patrons. Kelowna audiences represent approximately 50 per cent of the total.

Financial Management:

City of Kelowna funding as proposed in this report represents approximately 5.7 per cent of the organization's total budget, similar to previous years.

The BC Arts Council, provincial Gaming and the Canada Council for the Arts continue to provide both operating and project support. The organization's current revenue budget reflects a sustainable balance between earned revenues (47 per cent), public sector support (27 per cent) and donations/sponsorships (26 per cent).

Consistent with previous years, approximately 65 per cent of the overall expense budget is devoted to production and programming costs, with the remainder attributable to administration.

The organization is attuned to financial risks, which include fluctuating ticket sales, potential changes to provincial gaming funding, and changing sponsorship relationships. In order to address these risks the organization is adjusting its programming, building more robust data tracking, improving its systems and processes for donor cultivation and stewardship and gradually accumulating working capital to buffer against changes in the funding environment.

Board and Governance:

The Board membership provides appropriate expertise and relevant community representation for an organization of its size, including legal and financial professionals, and members with extensive experience in the non-profit and arts sectors. The Board recently completed a comprehensive governance and policy manual for the organization and continues to work on additional policy initiatives. The Board is actively engaged in fundraising through events, donor cultivation and development of sponsorship opportunities.

Schedule B: Ballet Kelowna
Report from the Cultural Services Manager Feb. 1, 2016

Planning, Leadership and Administration:

Ballet Kelowna is emerging from a turnaround/transitional phase into a period of stabilization and rapid growth, supported by a sustainable programmatic and operational model.

Moving the company into a new studio space in 2015 has already enabled the development of new programs, events and revenue streams, and will also serve as a platform for audience engagement and sponsorship opportunities.

High level strategies for the next three years are:

- strengthening the organization's capacity through staff, Board and volunteer recruitment and development;
- strengthening the artistic programming with a longer performance season, a new touring model and an array of revenue-generating programs; and
- strengthening the 'Excellence in Motion' brand and exploring new approaches to community engagement.

CEO/Artistic Director Simone Orlando has many strong affiliations and connections within the national and international dance community and this has enabled new opportunities for Ballet Kelowna dancers and special offerings for local audiences.

The recent addition of a full-time Development & Communications Manager will assist the organization in managing growth and capitalizing on revenue and sponsorship opportunities. Further growth in programming and outreach will require the eventual addition of staff to support the Artistic Director.

Artistic Programs and Services:

Ballet Kelowna is establishing itself as a bridge between the local community and high-quality choreography and dance from Canada and North America. The company has grown to six professional dancers and one apprentice dancer.

Program highlights for the 2015/16 season include:

- *The Nutcracker* - seven performances of *The Nutcracker* in December, 2015 continued this seasonal tradition, featuring Ballet Kelowna dancers alongside many students from The Canadian School of Ballet.
- *Boundless* - special student Matinee Preview February 4, public performances February 5 and 6, 2016 - the programme will include the world premiere of '*Now What, Like, When*' featuring new choreography (Matjash Mrozewski) and music (Owen Belton) developed in partnership with the Okanagan Boys and Girls Club, Studio 9 and UBC Okanagan. Over 50 youth participated in workshops and contributed their perspectives to the creation of this new work, which will become Ballet Kelowna's new 'Boundless Youth' touring performance for schools in 2016, accompanied by education materials. In addition, the entire *Boundless* program will tour in February and March to six BC communities.
- *Going Home Star: Truth and Reconciliation* - Ballet Kelowna once again offers high-profile professional dance on the Kelowna Community Theatre stage for two performances of this acclaimed production by Canada's Royal Winnipeg Ballet, representing the stories of survivors of the residential school system.

- *Renaissance* - a collaborative multi-disciplinary programme of dance and music created by Ballet Kelowna and Continuum Contemporary Music from Toronto. The programme, entirely performed to live music, includes the world premieres of two newly commissioned contemporary ballets and two remounts. After two performances in Kelowna on April 29 and 30, the program will tour in the spring and fall to at least six cities in British Columbia and Ontario.

Planning for the 2016/17 season is underway, including a special Canada 150 collaboration between Ballet Kelowna and the Okanagan Symphony.

Participation and Impact:

In addition to staged local and touring performances, Ballet Kelowna provides unique opportunities for Kelowna residents to connect and engage with Ballet Kelowna, its dancers and the artform:

- *Launch* - a one-hour informal preview performance with admission by donation which welcomes new and long-time supporters to enjoy a behind the scenes look at the work being created and prepared for the upcoming season. 275 people attended the second annual *Launch* at the Rotary Centre for the Arts on Oct. 28, 2015.
- Open Studio events/rehearsals - as new programs are readied for performance, the public is invited to visit the Ballet Kelowna studio and see the final preparations in the intimate studio setting
- Donor Recognition and Subscriber receptions
- New in 2016 - Adult Ballet Classes taught by Mark Dennis, a Ballet Kelowna dancer have proven to be so popular that more classes were added to accommodate the demand.
- *Dance Break* - during the March spring break, the Ballet Kelowna studio will host up to 20 advanced dancers from throughout the Okanagan Valley who will work through the choreographic process with professional dancers and choreographers.
- *Master Class and Choreographic Workshop Series* - will give advanced dancers and teachers in the region the opportunity to work with international artists who are collaborating with the company.
- *Okanagan Summer Dance Intensive* - in 2016, Ballet Kelowna will, for the first time, assume artistic direction of this three-week course of pre-professional training for aspiring dancers from all over British Columbia and Alberta. The program features daily classes in classical ballet, pointe, repertoire, contemporary dance and improvisation.

As part of its growth strategy, Ballet Kelowna is focused on building its support and audience base in its home market of Kelowna, by increasing the number of local performances, inviting audiences into the studio, and enhancing its local marketing outreach. Touring is not as extensive as in past years but the company's touring performances are now occurring in larger and more prestigious venues such as the Banff Centre, Toronto and the Chutzpah Festival in Vancouver.

Total anticipated audience for the 2015/16 season is approximately 10,000 people, consistent with previous years. 63 per cent of Ballet Kelowna audiences are under the age of 65.

Subscription sales have continued to increase year over year (62% increase between 2013/14 and 2014/15 and another 15% increase for the current season). The organization has 161

members and 2,300 subscribers for its e-newsletter. Revenue from memberships and donations more than doubled between 2014 and 2015.

Financial Management:

The new studio space has generated significant new revenue streams for the organization through the offerings of dance classes, the Summer Dance Intensive, rentals and the ability to increase engagement with community and corporate supporters. Increased earned revenue has allowed the organization to reduce its reliance on event-based fundraising which is resource-intensive and often generates minimal net returns.

The current fiscal year projects a 53 per cent increase in revenues, balanced between earned (34 per cent), public sector (40 per cent) and sponsorships and donations (25 per cent).

62 per cent of the expense budget is dedicated to production costs, consistent with previous years.

The organization has successfully obtained multi-year operating support from the Central Okanagan Foundation, and continues to benefit from significant project grants for commissioning, touring, capital improvements and youth engagement provided by the Canada Council for the Arts, Canadian Heritage, the British Columbia Arts Council and several foundations. Eligibility for operating support from provincial and federal funders is anticipated within the next year.

City of Kelowna funding as proposed in this report represents approximately 6.5 per cent of the organization's total revenues and 16 per cent of its total grant support from all sources.

Board and Governance:

The organization's Board consists of 11 members with a broad range of expertise and experience, including accountancy, public relations, administration, human resources, law and business. The Board functions in a governance capacity with regular financial reporting, participation in strategic planning, and policy development. Through a City of Kelowna Organization Development Grant, the organization is working with consultants to develop an annual development plan and a marketing plan.

Schedule C: Alternator Centre for Contemporary Art
Report from the Cultural Services Manager Feb. 1, 2016

Planning, Leadership and Administration:

The organization is entering its 27th year of operation in Kelowna and remains the largest and most established artist-run centre in the BC interior.

Strategic goals for 2016 include:

- 1) Maintain a high standard of professional programming, exhibiting the work of top emerging professional artists from across Canada through a national call for submissions and a juried selection process;
- 2) Continued development of community programming through improved promotions and enhanced exhibition support; and
- 3) Increasing revenue through fundraising activities, sponsorship and personal donations.

The organization has, through access to multi-year operating funding from the Central Okanagan Foundation, been able to add part-time staff support for the full-time Administrative and Artistic Director. This support is dedicated to community programming and is critical to the organization's efforts to extend its reach into the community and attract further support.

Experienced leadership and administration is in place and no major changes in direction are anticipated for 2016.

Artistic Programs and Services:

The Centre continues to provide a range of opportunities for artists and the public to engage with contemporary art practice:

- a) Professional programming - seven professional exhibitions are planned for 2016, an increase from five exhibitions in 2015. Professional artists provide artist talks and are also encouraged to consider how the exhibition content can be extended beyond the gallery walls into the community through public activities or appearances;
- b) Skin and Bones Experimental Music Series - over 180 people attended five performances of experimental and improvisational music in 2015. The series will expand in 2016 with up to 10 performances planned. Admission fees are nominal (8 to 10 dollars);
- c) Community programming - the Alternator continues to provide significant opportunities for the community to participate in contemporary art practice through:
 - The Intermission Series - four exhibitions coordinated by UBCO students;
 - The AlterKnowledge Discussion Series - nine sessions featuring exhibiting artists, academics and activists in dialogue regarding issues and themes of interest in contemporary art practice;
 - Members Gallery exhibitions - a series of 17 exhibitions for local artists is planned for 2016. For many local artists, the Alternator is a welcoming venue for their first public exhibition of work. Approximately 200 local artists are featured in the main and Members Gallery each year;
 - Annual Members Show and Sale - attracts approximately 400 people each year
 - Draw by Night - the Alternator is a host venue for a group of artists who gather on a regular basis for an evening of drawing and sketching

- d) Special collaborations and events - the Alternator collaborates with other organizations to host community exhibitions relating to specific topics or events. In 2015, the Alternator hosted exhibitions in partnership with the Okanagan Pride Festival and the Central Okanagan Hospice Association.
- e) Fundraising events - a series of four events are planned for 2016, led by volunteer members of the Board of Directors.

Participation and Impact:

The Alternator's central demographic is aged 18 to 35, and the organization tested a number of new and unique events tailored to this group in 2015 which helped to increase Gallery attendance and participation by 27 per cent (9,746 total).

The organization has also reached out to minority groups including ethnic and cultural groups. For example, in 2015, summer student Rishma Johal facilitated a number of activities focused on exploring the lives and stories of migrant workers resulting in dance workshops and a community exhibition and film screening in the Members' Gallery.

Accessibility to Alternator programming is a priority for the organization. Entry to exhibitions is by donation and most events are free. If events do have a fee, it is rarely above \$10 and is always accompanied by a reduced price for members. Memberships are priced affordably at \$35/\$50 annually, with an option to gain membership through twelve hours of volunteer time.

The organization has a robust on-line presence through social media and a dedicated website and issues regular media releases about upcoming exhibitions and events.

Financial Management:

There organization's revenues include substantial support from the Canada Council for the Arts (multi-year operating), the British Columbia Arts Council (annual operating support), the Central Okanagan Foundation (multi-year operating) and provincial Gaming. City of Kelowna funding as proposed in this report represents approximately 19 per cent of total revenues. This is consistent with previous years.

The 2016 operating budget does not reveal any major changes from the previous year's budget. The organization's financial outlook is stable and positive and the Board is focusing on increasing revenue from fundraising activities in 2016. This responds to previous feedback provided by the City of Kelowna and continues progress made by the organization in this regard in 2015.

Board and Governance:

The Canada Council for the Arts, one of the Alternator's major funders, requires that the Board of artist-run centres must be comprised of at least 51 per cent practicing artists. In order to ensure that the Board has the right skill set to provide good governance, the organization has also recruited Board members with skills in accountancy, public relations and academia, and continues to seek out other volunteers with skills in fundraising and volunteer management.

Financial systems, reporting and budgeting processes, with assistance from contracted bookkeeping/financial professionals are in place.

The organization has developed policies, systems and processes to manage various governance functions, including human resources, financial oversight, conduct and ethics, conflict of interest and succession planning.

Schedule D: Bumbershoot Children's Theatre
Report from the Cultural Services Manager Feb. 1, 2016

Planning, Leadership and Administration:

Bumbershoot Children's Theatre is in its 8th season, operating out of its Cannery Lane location in the Cultural District.

Bumbershoot is dedicated to introducing youth and children to the magic of theatre through creative theatre experiences which engage the imagination, intellect and spirit. Learning and education are core values for Bumbershoot's work, with extensive outreach into School District 23 (SD23) classrooms and a range of opportunities for children and youth to actively participate in theatrical production.

The organization has received operating support of \$10,000 annually from the City of Kelowna since 2011 and has also received project grants in 2011 (\$5,000), 2014 (\$3,000) and 2015 (\$5,000).

This is the first year that Bumbershoot has applied for support through the Professional Operating Program.

The organization is led by a full-time Artistic Director, supported by one part-time administrator, six contracted educators and production staff, and an active group of volunteers who provide marketing, front-of-house and production support. Contracted bookkeeping support is in place.

Mainstage productions and classes are core programs for the organization and are well-established. The organization's education and school residency programs are in a growth phase. The demands arising from growth are addressed through:

- the Artistic Director continuing to seek out professional development connections and assistance; and
- the Artistic Director delegating some core programming duties to contracted personnel in order to devote more attention to program growth and development.

Balancing the demands of artistic programming and the resources needed for administrative oversight is always a difficult task for organizations in a growth phase. The City's feedback will include a recommendation that the Board and other volunteers continue to be actively involved in supporting the Artistic Director until the budget allows for more administrative support staff to be hired.

Artistic Programs and Services:

Since its inception, Bumbershoot has developed 10 original productions, including script and music, along with producing many cherished and well-known favourites from children's theatre repertoire each year.

For 2016, programming includes:

- Six mainstage shows - performances of theatre repertoire for young audiences and their families. Casts include both adult and young actors. Professional actors and contributors are compensated at standard rates.

- 10 class offerings per season (Fall/Winter/Spring) reaching all ages - classes with professional instruction include movement and dance, musical theatre, improvisation, and acting and vocal technique.
- Two intakes for the Collaborative Arts for Stage and Theatre (CAST) program. This youth development program provides six months of mentoring for youth aged 10 to 18 in every aspect of performing and producing a live theatre show. Each intake ends with a public performance.
- Spring Break and Summer Camps - Bumbershoot frequently collaborates with other venues such as the Kelowna Art Gallery for these camps which attract hundreds of children each year.
- Summer performances - in partnership with Festivals Kelowna's Parks Alive! program, Bumbershoot has brought free live theatre performances for family audiences to parks throughout Kelowna. (2014: Pirates in the Parks / 2015: The Flower Ball) These special performances feature original scripts and songs created by Bumbershoot's Artistic Director and musical collaborators, encourage fun audience participation, and showcase the talents of local performers of all ages.
- SoundPlay - a series of one-hour immersive experiences, combining sound and music with creative expression. Local musicians, including core players from the Okanagan Symphony Orchestra, were involved in the 2015 program.
- School performances - in 2015, at the invitation of SD23, Bumbershoot delivered 43 performances of its production of Red Riding Hood reaching an audience of over 10,000 students in just 15 days. The production's storyline explored issues of personal safety and supported various curriculum objectives.
- School residencies - in 2016, building on a successful launch in 2015, Bumbershoot will deliver a program for underserved and at risk students at eight schools within SD23. The students learn acting and storytelling techniques which help them gain self-confidence and self-expression.
- Workshops - each year Bumbershoot's Artistic Director invites experienced theatre professionals to Kelowna for a series of workshops open to the arts and theatre communities. Past guests include personnel from Cirque du Soleil, Bard on the Beach, and veterans of Broadway and Stratford stages.

Participation and Impact:

Bumbershoot expanded its physical space in 2015 by taking over an adjoining rental space in Cannery Lane. The new space includes upstairs offices, dressing rooms, costume room and washroom and additional classroom and workshop space. The mainstage space is designed for small audiences of approximately 50-60 people.

Over 18,000 participants and audiences were part of Bumbershoot programs in 2015.

Bumbershoot has a policy of 'no child or family left behind.' Tickets and class registrations are subsidized on a case by case basis.

Bumbershoot specializes in multi-generational and inclusive creative activity which stimulates the imagination and builds belonging. Theatre is a naturally collaborative setting in which participants learn about themselves and about working together. Bumbershoot seeks to counteract the erosion of authentic connection in a 'plugged in' digitally-mediated world by bringing people together to connect, learn and grow, and have fun doing it. Although professionals are involved, the majority of participants are having their first experiences with theatre. Through the last seven years, Bumbershoot's programs have introduced children to

theatre at a very young age; some of those children have remained involved in Bumbershoot for years and now, as young men and women have advanced to more complex and demanding roles and moved on to higher levels of arts education with aspirations of a professional career.

Financial Management:

City of Kelowna funding as proposed in this report represents approximately 7.5 per cent of the organization's 2016 revenue budget, which is balanced between earned revenue (49 per cent) and grant revenue (48 per cent) with a small balance from donations and sponsorships.

The organization's revenues grew by over 20 per cent in 2015.

It should be noted that the organization has received substantial in-kind donations of labour and materials from Home Depot for the expansion of its space which are not reflected in the current budget; budgeting practices will be adjusted to capture this kind of information in future, and it is anticipated that donations and sponsorships will be more accurately reflected in the next fiscal year.

Staff will also encourage the organization to actively participate in the artsVest program which will build skills in sponsorship development and leverage sponsorships with incentive grants.

Bumbershoot is supported by the Central Okanagan Foundation (operating), BC Arts Council (project), provincial Gaming, TELUS, and Kids Care. The organization is exploring other sources of project and operating support in addition to developing a fundraising strategy.

The expense budget will be adjusted in future to more accurately reflect costs attributable to both production and administration.

The organization projects a balanced budget for the current year with targeted growth in earned revenue. Financial statements indicate modest retained earnings from previous years.

Board and Governance:

The six-member Board of Directors includes two youth representatives, both of whom have been active participants for over five years. There are Board vacancies to be filled, and recruitment efforts are focused on Board members who have accountancy, fundraising and marketing experience.

The Board is transitioning toward a full governance model, but until more administrative support is in place for the Artistic Director, Board members will still play an active role in volunteering and supporting various programming and development initiatives.

Monthly financial reporting will occur in 2016. Feedback from the City of Kelowna will include a recommendation that the Board work to fill its vacancies and continue to develop the organization's governance and policy framework. A consultant will be assisting the organization with its Board orientation and manual.