

1. FOLLOW- UP SUMMARY REPORT – ANNUAL GLOBAL FUNDING

This form is to be used for reference only. Please use the standard SaskCulture forms for your report. Please note that as this form is used to collect standard financial data from all PCOs, it is important to report using these standard expense and revenue categories.

Name of Organization		Non-Profit Corporation #
Mailing Address	City/Town	Postal Code
Contact Person	Office Phone	Fiscal Year Start (d/m/y)
<i>Name of Signing Officer</i>	<i>Signature of Signing Officer</i>	

Follow-up Component		Revised Budget Component	
Grant #	Grant Amount	Grant #	Grant Amount
C:0 : _ _ _	\$ _ _ , _ _ _	C:0 : _ _ _	\$ _ _ , _ _ _

	YEAR BEING FOLLOWED-UP				REVISIONS FOR CURRENT YEAR		
	Request ₁	Revised Budget ₂	Actual ₃	Variance (2-3) ₄	Request ₅	Revised ₆	Variance (5-6) ₇
EXPENDITURES							
A. Administration personnel office other sub-total							
B. Travel/Meetings staff volunteers AGM other sub-total							
C. Corporate Business memberships professional fees Insurance other sub-total							
D. PR and Communications newsletter other sub-total							
E. Programs /Services personnel program/services member funding other sub-total							

F. Other							
TOTAL EXPENDITURES							

	YEAR BEING FOLLOWED-UP				REVISIONS FOR CURRENT YEAR		
	Request ₁	Revised Budget ₂	Actual ₃	Variance (2-3) ₄	Request ₅	Revised ₆	Variance (5-6) ₇
Revenue							
A. Self-generated membership fees							
program/service fees							
fundraising							
corporate sponsorship							
sub-total							
B. Grants							
Saskatchewan Lotteries Trust - AGF							
Saskatchewan Lotteries Trust - other							
other agencies							
sub-total							
C. Other							
TOTAL REVENUE							
Surplus/Deficit							
Accumulated Surplus/Deficit							

Column Legend

Follow-up for previous year

1. Funds originally requested
2. Revised budget approved at beginning of year
3. Actuals taken from audited financial statement
4. Difference between revised budget and actuals (2-3)

Revised Budget

5. Funds originally requested
6. Revisions budget approved at beginning of year
7. Difference between request and revisions (5-6)

2. AUDITED FINANCIAL STATEMENTS 3. BRIDGING NOTES (if applicable) 4. ANNUAL REPORT

5. GRANT PROGRAM SUMMARY

Provide a summary in the following format:

Grant /Award Type	Grant Recipient	Location/Community benefiting from grant	Total Amount Allocated	Total Lottery Amount
Organization Grants				
Insert List				
Totals			*	
Individual Grants/Scholarships				
Insert List				
Totals			*	

*The sum of these totals must match your Member Funding expense line in your AGF budget form.

6. CULTURAL PROFILES

Provide three Cultural Profile Stories from your PCO, Member Funded Organizations, or Members, that illustrate how your organization has made a cultural impact. Please use the attached Cultural Profiles form (page 12). A minimum of three are requested each year, and may be submitted with the Follow-up or at other times throughout the year.

- Three Cultural Profile Stories provided with this follow-up
- Additional Cultural Profiles to come

7. CULTURAL IMPACT STATEMENTS

Provide a 1-2 page cultural impact statement that addresses each of the four areas of the cultural impact criteria. For each cultural criteria area, provide a brief statement and highlight a few of your best examples of how your organization is making a significant cultural impact:

- a.) Unique and relevant contribution to culture
- b.) Development of culture in Saskatchewan
- c.) Increased recognition of the value of culture
- d.) Recognition of Diversity

OPTIONAL: Provide your best examples of where your organization is making significant economic and social contributions.

8. STATISTICS COLLECTION FORM

Only fill out sections that are applicable to your organization.

	Previous Year	Follow up
Identify specific year range (i.e. 2006-07)		
1. MEMBERSHIP		
a.) Individual members – TOTAL in PCO		
<i>Estimated Breakdown of:</i> Youth (0–29 yrs)		
Adults (30-54 yrs)		
Seniors (55+ yrs)		
<i>% Estimated Youth:</i> Pre-school (0-4 yrs)		
Elementary School (5-14 yrs)		
High School (15-18yrs)		
Older youth (19-29 yrs)		
b.) Organizational members – TOTAL in PCO		
Estimated organizational members in these organizations - total		
Estimated individual members in these organizations - total		
<i>% Estimated Breakdown:</i> Youth (0–29 yrs)		
Adults (30-54 yrs)		
Seniors (55+ yrs)		
<i>% Estimated Youth</i> (if you are able to provide an estimate):		
Pre-school (0-4 yrs)		
Elementary School (5-14 yrs)		
High School (15-18 yrs)		
Older youth (19-29 yrs)		

	Previous Year	Follow up
See guidelines on definitions for Full-Time and Part-Time staff		
2. STAFF EMPLOYED		
c.) Total Full-Time Staff Members employed at your organization		
<i>Estimated Breakdown of:</i> Youth (15-18 yrs)		
Youth (19-29 yrs)		
Adults (30-54 yrs)		
Seniors (55+ yrs)		
First Nations/Métis ancestry (self-declared)		
On contract		
Total Part-time Staff Members employed at your organization		
<i>Estimated Breakdown of:</i> Youth (15-18 yrs)		
Youth (19-29 yrs)		
Adults (30-54 yrs)		
Seniors (55+ yrs)		
First Nations/Métis ancestry (self-declared)		
On contract		
d) Total Full-Time Staff Members employed by your Member Organizations		
e.) Total Part-Time Staff Members employed by your Member Organizations		

See chart in guidelines	Previous Year	Follow up	Supply only if collected	Previous Year	Follow up
3. VOLUNTEERS					
a.) TOTAL individual Volunteers supporting your organization			b.) TOTAL individual Volunteers supporting your Member Organizations		
Total type of volunteer role			Total type of volunteer role		
Total volunteer instances			Total volunteer instances		
Total volunteer hours provided			Total volunteer hours provided		
<i>% Estimated Breakdown of: Youth (0 – 29 yrs)</i>			<i>% Estimated Breakdown of: Youth (0 – 29 yrs)</i>		
Adults (30-54 yrs)			Adults (30-54 yrs)		
Seniors (55+ yrs)			Seniors (55+ yrs)		
Below, provide % of total volunteers that are:			Below, provide % of total member org volunteers that are:		
First Nations/Métis youth (0-29 yrs)			First Nations/Métis youth (0-29 yrs)		
First Nations/Métis adults (30-54 yrs)			First Nations/Métis adults (30-54 yrs)		
First Nations/Métis seniors (55+ yrs)			First Nations/Métis seniors (55+ yrs)		
Northern residents			Northern residents		
Rural residents			Rural residents		
Other			Other		
Total Board members			Total Board members		
Total Committee members			Total Committee members		
<i>% Estimated Breakdown of Board and Com. Volunteers: Youth (0-29 yrs)</i>			<i>% Estimated Breakdown of Board and Com. volunteers: Youth (0-29 yrs)</i>		
Adults (30-54 yrs)			Adults (30-54 yrs)		
Seniors (55+ yrs)			Seniors (55+ yrs)		
Below, provide % of total Board and Committee members that are:			Below, provide % Member Board and Committee members that are:		
First Nations/Métis youth (0-29 yrs)			First Nations/Métis youth (0-29 yrs)		
First Nations/Métis adults (30-54 yrs)			First Nations/Métis adults (30-54 yrs)		
First Nations/Métis seniors (55+ yrs)			First Nations/Métis seniors (55+ yrs)		
Northern residents			Northern residents		
Rural residents			Rural residents		
Other			Other		
Total Volunteers Leading programs			Total Volunteers Leading programs		
Youth (0-29 yrs)			Youth (0-29 yrs)		
Adults (30-54 yrs)			Adults (30-54 yrs)		
Seniors (55+ yrs)			Seniors (55+ yrs)		
Below, provide % of volunteers leading programs that are			Below, provide % volunteers leading programs that are:		
First Nations/Métis ancestry			First Nations/Métis ancestry		
Northern residents			Northern residents		
Rural residents			Rural residents		
Other			Other		

	Previous Year	Follow up		Previous Year	Follow up
4. PROGRAMS & SERVICES - PCO					
a.) TOTAL distinct Program types provided by your organization only (list Member organization programs in next section):					
(i) Total programs with registered participants:			ii) Total programs with open public or audience participation:		
Total number of participants			Total number of participants		
<i>Estimated Participation by:</i> Youth (0-29 yrs)			<i>Estimated Participation by:</i> Youth (0-29 yrs)		
Adults (30-54 yrs)			Adults (30-54 yrs)		
Seniors (55+ yrs)			Seniors (55+ yrs)		
<i>% Estimated Youth if you are able</i>			<i>% Estimated Youth if you are able</i>		
Pre-school (0-4 yrs)			Pre-school (0-4 yrs)		
Elementary School (5-14 yrs)			Elementary School (5-14 yrs)		
High School (15-18 yrs)			High School (15-18 yrs)		
Older youth (19-29 yrs)			Older youth (19-29 yrs)		
iii). Of your total programs, how many programs were aimed at FIRST NATIONS OR MÉTIS participation:					
Total number of participants			iv). Of your total programs, how many programs were aimed at NORTHERN participation:		
<i>Estimated Participation by:</i> Youth (0-29 yrs)			<i>Estimated Participation by:</i> Youth (0-29 yrs)		
Adults (30-54 yrs)			Adults (30-54 yrs)		
Seniors (55+ yrs)			Seniors (55+ yrs)		
<i>% Estimated Youth if you are able</i>			<i>% Estimated Youth if you are able</i>		
Pre-school (0-4 yrs)			Pre-school (0-4 yrs)		
Elementary School (5-14 yrs)			Elementary School (5-14 yrs)		
High School (15-18 yrs)			High School (15-18 yrs)		
Older youth (19-29 yrs)			Older youth (19-29 yrs)		

4. PROGRAMS & SERVICES - PCO (cont'd)		
	Previous Year	Follow up
v). Of your total programs, how many programs were aimed at MAINLY YOUTH participation:		
Total number of participants		
<i>Estimated Participation by:</i> Youth (0-29 yrs)		
Adults (30-54 yrs)		
Seniors (55+ yrs)		
<i>% Estimated Youth if you are able</i>		
Pre-school (0-4 yrs)		
Elementary School (5-14 yrs)		
High School (15-18 yrs)		
Older youth (19-29 yrs)		

	Previous Year	Follow up
vi). Of your total programs, how many programs were aimed at MAINLY SENIORS participation:		
Total number of participants		
<i>Estimated Participation by:</i> Youth (0-29 yrs)		
Adults (30-54 yrs)		
Seniors (55+ yrs)		
<i>% Estimated Youth if you are able</i>		
Pre-school (0-4 yrs)		
Elementary School (5-14 yrs)		
High School (15-18 yrs)		
Older youth (19-29 yrs)		

	Previous Year	Follow up
vii). Of your total programs, how many programs were aimed at MAINLY RURAL participation:		
Total number of participants		
<i>Estimated Participation by:</i> Youth (0-29 yrs)		
Adults (30-54 yrs)		
Seniors (55+ yrs)		
<i>% Estimated Youth if you are able</i>		
Pre-school (0-4 yrs)		
Elementary School (5-14 yrs)		
High School (15-18 yrs)		
Older youth (19-29 yrs)		

	Previous Year	Follow up		Previous Year	Follow up
4. PROGRAMS & SERVICES - MEMBER ORGS					
a.) TOTAL distinct Program types provided by your member organizations only					
(i) Total programs with registered participants:			ii) Total programs with open public or audience participation:		
Total number of participants			Total number of participants		
<i>Estimated Participation by:</i> Youth (0-29 yrs)			<i>Estimated Participation by:</i> Youth (0-29 yrs)		
Adults (30-54 yrs)			Adults (30-54 yrs)		
Seniors (55+ yrs)			Seniors (55+ yrs)		
<i>% Estimated Youth if you are able</i>			<i>% Estimated Youth if you are able</i>		
Pre-school (0-4 yrs)			Pre-school (0-4 yrs)		
Elementary School (5-14 yrs)			Elementary School (5-14 yrs)		
High School (15-18 yrs)			High School (15-18 yrs)		
Older youth (19-29 yrs)			Older youth (19-29 yrs)		
iii). Of their total programs, how many programs were aimed at FIRST NATIONS OR MÉTIS participation:			iv). Of their total programs, how many programs were aimed at NORTHERN participation:		
Total number of participants			Total number of participants		
<i>Estimated Participation by:</i> Youth (0-29 yrs)			<i>Estimated Participation by:</i> Youth (0-29 yrs)		
Adults (30-54 yrs)			Adults (30-54 yrs)		
Seniors (55+ yrs)			Seniors (55+ yrs)		
<i>% Estimated Youth if you are able</i>			<i>% Estimated Youth if you are able</i>		
Pre-school (0-4 yrs)			Pre-school (0-4 yrs)		
Elementary School (5-14 yrs)			Elementary School (5-14 yrs)		
High School (15-18 yrs)			High School (15-18 yrs)		
Older youth (19-29 yrs)			Older youth (19-29 yrs)		

4. PROGRAMS & SERVICES - MEMBER ORGS (cont'd)		
	Previous Year	Follow up
v). Of their total programs, how many programs were aimed at MAINLY YOUTH participation:		
Total number of participants		
<i>Estimated Participation by:</i> Youth (0-29 yrs)		
Adults (30-54 yrs)		
Seniors (55+ yrs)		
<i>% Estimated Youth if you are able</i>		
Pre-school (0-4 yrs)		
Elementary School (5-14 yrs)		
High School (15-18 yrs)		
Older youth (19-29 yrs)		

	Previous Year	Follow up
vi). Of their total programs, how many programs were aimed at MAINLY SENIORS participation:		
Total number of participants		
<i>Estimated Participation by:</i> Youth (0-29 yrs)		
Adults (30-54 yrs)		
Seniors (55+ yrs)		
<i>% Estimated Youth if you are able</i>		
Pre-school (0-4 yrs)		
Elementary School (5-14 yrs)		
High School (15-18 yrs)		
Older youth (19-29 yrs)		

	Previous Year	Follow up
vii). Of their total programs, how many programs were aimed at MAINLY RURAL participation:		
Total number of participants		
<i>Estimated Participation by:</i> Youth (0-29 yrs)		
Adults (30-54 yrs)		
Seniors (55+ yrs)		
<i>% Estimated Youth if you are able</i>		
Pre-school (0-4 yrs)		
Elementary School (5-14 yrs)		
High School (15-18 yrs)		
Older youth (19-29 yrs)		

B1.) Total Services provided by your organization		
i.) Total times services provided		
<i>Est. Times Service provided to:</i> Youth (0-29 yrs)		
Adults (30-54 yrs)		
Seniors (55+ yrs)		
<i>% Estimated Youth if you are able</i>		
Pre-school (0-4 yrs)		
Elementary School (5-14 yrs)		
High School (15-18 yrs)		
Older youth (19-29 yrs)		
First Nations and/or Métis Peoples		
Northern residents		

ii.) Total services aimed at mainly FIRST NATIONS & MÉTIS peoples		
Total times service provided		
Total services aimed at mainly YOUTH		
Total times service provided		
Total services aimed at mainly NORTHERN residents		
Total times service provided		
Total services aimed at mainly SENIORS		
Total times service provided		

iii) Please attach a list of all services.

B2.) Total Services provided by your member organizations		
i.) Total times services provided		
<i>Est. Times Service provided to:</i> Youth (0-29 yrs)		
Adults (30-54 yrs)		
Seniors (55+ yrs)		
<i>% Estimated Youth if you are able</i>		
Pre-school (0-4 yrs)		
Elementary School (5-14 yrs)		
High School (15-18 yrs)		
Older youth (19-29 yrs)		
First Nations and/or Métis Peoples		
Northern residents		

ii.) Total services aimed at mainly FIRST NATIONS & MÉTIS peoples		
Total times service provided		
Total services aimed at mainly YOUTH		
Total times service provided		
Total services aimed at mainly NORTHERN residents		
Total times service provided		
Total services aimed at mainly SENIORS		
Total times service provided		

iii) Please attach a list of all services.

9. MONITORING INFORMATION

a.) Corporate Update:

Has the organization’s constitution been updated in the last 12 months? Yes ____ No ____

Include ONE COPY of the organization’s constitution and bylaws, or indicate that it is already on file with SaskCulture.

____ Bylaws already on file with SaskCulture

____ Bylaws included in this report

Highlight any significant changes below and briefly state reasons for changes.

b.) Member Funding Program policies and guidelines (if applicable):

Provide one copy of the following materials for funding programs offered by your organization, supported partially, or in whole, by Saskatchewan Lotteries funding.

____ Terms of Reference

____ Application & Reporting Guidelines

____ Forms

c.) Membership list in electronic format:

Please forward a listing that includes the following:

Individual Members (provide individual’s name) Or Organizational Members (provide corporate name)	Location (city, town, RM, etc.)	Type of Membership (Individual, Organization, Associate, Student, etc.)

d.) Risk Management Requirements:

Auditor: Are the organization’s financial statements audited yearly by a firm registered with the Institute of Chartered Accountants, Society of Management Accountants, or the Certified General Accountants? Yes ____ No ____

Firm Name _____

Address _____

This is a requirement of the Saskatchewan Lotteries Trust Fund. Check with your auditor to ensure they are a registered firm. Individual status is not sufficient.

Insurance: Does your organization have the following insurance in place?

- ___ General Liability in the amount of at least \$2,000,000
- ___ Participant's Liability of at least \$2,000,000
- ___ Director's and Officer's Liability, including wrongful dismissal, in the amount of at least \$1,000,000
- ___ Bonding of Employees and Board members in the amount of \$100,000
- ___ Non-owned Auto Liability in the amount of \$2,000,000
- ___ Tenant Legal Liability of at least \$250,000

Eligible groups must maintain at least the minimum level of insurance.

e.) Lottery Recognition Checklist

PCOs are required to acknowledge Saskatchewan Lotteries as a source of funding and promote the benefits of lottery ticket sales. Recognition guidelines are available from SaskCulture Inc. In order to verify recognition please indicate the ways you have recognized Lottery support during the past year in the chart below.

REQUIRED: (Please show evidence of compliance)

Placement of Saskatchewan Lotteries logo:	
<input type="checkbox"/> Annual Report <input type="checkbox"/> Newsletters (electronic and print) <input type="checkbox"/> Web site <input type="checkbox"/> Organization's Brochures <input type="checkbox"/> Organization's Posters <input type="checkbox"/> Event Programs <input type="checkbox"/> Organization's multi-media materials (videos, DVDs, CDs, etc.)	(if applicable)
<input type="checkbox"/> Logo use policy in Member Funding guidelines <input type="checkbox"/> Logo use guidelines for groups <input type="checkbox"/> Organizational advertising in print or broadcast media	
Other Forms of Recognition:	
<input type="checkbox"/> Listed as funding source in audit <input type="checkbox"/> Web site links to SaskCulture and Saskatchewan Lotteries site <input type="checkbox"/> Lottery overview provided in Board and Staff orientation	

DESIRED, BUT NOT REQUIRED: (No evidence required)

Placement of Saskatchewan Lotteries advertisements:	Verbal Recognition of Saskatchewan Lotteries Funding:
<input type="checkbox"/> Annual Report <input type="checkbox"/> Newsletters <input type="checkbox"/> Program books, directories, etc. <input type="checkbox"/> Web site	<input type="checkbox"/> At Annual General Meeting <input type="checkbox"/> At Board Meetings <input type="checkbox"/> At Organization's other events
Promotion of Saskatchewan Lotteries by Member Funded Groups	Other Recognition Opportunities for Saskatchewan Lotteries
<input type="checkbox"/> Monitoring processes in place to ensure use <input type="checkbox"/> Distribution of general lottery promotion materials to Member Funded Groups <input type="checkbox"/> Additional activities to increase Lottery promotions	<input type="checkbox"/> Include in sponsor lists <input type="checkbox"/> Include as sponsor on permanent structure, murals, etc. <input type="checkbox"/> Credit on funded publications and products (DVDs, videos, CD's) <input type="checkbox"/> In media releases and other reports <input type="checkbox"/> Incentives to purchase lottery tickets <input type="checkbox"/> Event invitations <input type="checkbox"/> Event posters <input type="checkbox"/> Listed in Publications/Directories

APPENDIX - CULTURAL STORIES & PROFILES

SaskCulture uses story ideas from its funded groups to demonstrate the positive impact of cultural activity in Saskatchewan. Ideas are kept on file for use in appropriate communication and advocacy activities. In the past, stories have been used in various SaskCulture and partner publications, such as *Cultural Report*, *SaskCulture E-Update*, Saskatchewan Lotteries *Luck* Magazine, and Saskatchewan Tourism's *SaskSecrets*.

Please provide SaskCulture with three possible story ideas from the past year that highlight how cultural activity is benefiting Saskatchewan. You can send new ideas at any time.

Story Idea #1 **Provide a description of the story idea:**

Contact Person: _____ Organization _____

Phone No. _____ Date of activity _____

Story Idea #2 **Provide a description of the story idea:**

Contact Person: _____ Organization _____

Phone No. _____ Date of activity _____

Story Idea #2 **Provide a description of the story idea:**

Contact Person: _____ Organization _____

Phone No. _____ Date of activity _____

Submit additional Cultural Stories & Profiles to: SaskCulture Inc., 600, 2220 12th Avenue, Regina, SK S4P 0M8, Fax: (306) 780-9252 For more information, contact Diane Ell at (306) 780-9453 or (306) 780-9284.