



ARTSFAIRFAX

FY20 Operating Support Grant
Workshop

22 February 2019

Agenda

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- Purpose and Goals
- Eligibility
- Grant Restrictions
- Matching Requirements
- Budget as a Story – Brenda MacRoberts
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- Evaluation Criteria
- Underserved Districts
- Panel Insights – Melanie Jarratt Wolfe
- Terms and Conditions of a Grant
- Appeals Process
- Timeline and submitting your application
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Introduction

ARTSFAIRFAX creates and nurtures an environment in which the arts and artists can flourish, and is designated as Fairfax County's local arts agency. Through partnerships with schools, individual artists, arts organizations, and other cultural and community groups, **ARTSFAIRFAX** promotes and encourages excellence in the arts by initiating and supporting programs, activities, and policies that inspire, nurture, and reflect the cultural diversity of Fairfax County.

ARTSFAIRFAX Grant Programs

- **ARTSFAIRFAX** distributes more than \$500,000 annually in the county funds through competitive grants to arts organizations and artists of all disciplines
- There are currently 5 grant programs:
 - Project Support Grant
 - Operating Support Grant
 - Organizational and Professional Development Grant
 - Artist Grant
 - Fast Track Grant
- Eligible organizations may apply for all 4 organizational grant opportunities.

Purpose

ARTSFAIRFAX's Operating Support program invests in supporting the organizational goals and objectives of the county's arts institutions, helping them maintain their ongoing programs, services, and facilities. Rather than focus on new initiatives as justification for funding, Operating Support Grants seek to maintain organizational stability as a platform for the growth of the arts in Fairfax County.

Goals

Through the Operating Support Grant Program, **ARTSFAIRFAX** seeks:

- To provide support for established arts organizations and the development of new organizations;
- To encourage wide participation in the arts through diverse cultural programming available to all residents of Fairfax County;
- To promote opportunities for individual artists and arts organizations of all disciplines to create, present, and celebrate their artistic endeavors;
- To be a catalyst for increased private sector support for arts organizations through leveraged public funding.

Eligibility

All applicants must meet the following criteria to apply to the *Operating Support Grant Program*. Staff reviews all grant applications for eligibility prior to the review process.

1. An organization is eligible to apply to the *Operating Support Grant Program* if:

- It has as a core mission the creation, exhibition, presentation, production, or performance of and/or education in an arts discipline.
- It has regular activity in a minimum of four different months in the year or 120 days of the year.

Eligibility cont'd

2. An organization must:

- Be in compliance with all local, state, and federal laws; and
- Hold current or pending status under IRS code 501(c)(3); or
- Operate as a specifically defined arts division, or have its own arts program identity, within a larger nonprofit 501(c)(3) organization.

Eligibility cont'd

3. The organization or the division/program that is applying must have an address of record within the geographical boundaries of Fairfax County, the City of Fairfax, or the City of Falls Church and satisfy TWO of the following four criteria:

- Present at least 51% of public artistic activities within the geographical boundaries of Fairfax County, the City of Fairfax, or the City of Falls Church.
- Meet, rehearse, exhibit, and operate within the geographical boundary of Fairfax County, the City of Fairfax, or the City of Falls Church.
- Have 51% of board of directors' members work or reside in Fairfax County, the City of Fairfax, or the City of Falls Church.
- Verify that 51% of attendees at performances, exhibits, events, and activities reside in Fairfax County, the City of Fairfax, or the City of Falls Church evidenced through acceptable statistical data including but not limited to: ticket analysis, subscription data, box office surveys, and audience surveys.

Eligibility cont'd

4. The applicant must have submitted all required final reports for any grant(s) received from **ARTSFAIRFAX** during the previous fiscal year.

5. An organization must have independently prepared financial statements such as an audit or a treasurer's report (audit required for organizations with expenses of \$600,000 and above).

6. Organizations that receive line item funding from Fairfax County, George Mason University programs and divisions, and non-profit organizations and foundations that support county programs are only eligible to apply for Project Support grants, not Operating Support, Organizational and Professional Development, or Fast Track grants.

Grant Restrictions

All Operating Support grants must:

- Support activities, programs, or projects occurring within Fairfax County, the City of Fairfax, or the City of Falls Church;
- Have qualified artistic or scholarly, administrative, and management leadership (either professional or volunteer) capable of completing any grant-supported activities, programs, or projects;
- Occur within the dates of July 1, 2019 and June 30, 2020.

Grant Restrictions Cont'd

Operating Support grants **cannot be** used for:

- Fundraising activities, such as capital campaigns or endowment campaigns;
- Construction or renovation projects;
- Political advocacy costs;
- Activities not open to the general public;
- Debt retirement;
- Proselytizing, promoting any one faith over another.
- Events that would be inappropriate for a diverse, multicultural and multigenerational audience.

Matching Requirements

1. Every *Operating Support Grant Program* grant requires a two to one match by the applicant, *e.g. Amount requested: \$50,000, amount matching \$100,000*
2. The matching funds may come from any source except **ARTSFAIRFAX** or the Fairfax County government. Potential sources of your matching funds include foundation grants, private donations, ticket sales, and member dues.
3. In-kind contributions may only consist of donated goods.
4. The value of all in-kind contributions shown as income must be offset by line item expenses in the total budget.
5. The value of in-kind goods must be documented with invoices, billing statements, or donation letters. To the extent possible, documentation about the donor and the value of in-kind goods should be provided with the application. If the grant is awarded, this documentation must be provided with the final report required at the end of the grant period.

Budget Levels

- Organizations may apply in one of five budget levels within the *Operating Support Grant Program*. The applicant's budget size determines the appropriate category. If an applicant is an arts division/program within a larger nonprofit 501(c)(3) organization, then the arts division/program's budget should determine its category, not the larger nonprofit's budget size. Applicant using a fiscal sponsor should use the applicant organization budget, not the fiscal agent.
- For the *Operating Support Grant Program*, your budget size is determined by the **"Total Expenses"** you describe for your **most recently completed fiscal year** on the Financial Form. "Pass through money," money that is collected by the organization and then immediately dispersed, as in the case of collecting art sales and then distributing that money back to the individual artist, should not appear in an organization's budget as income. If the organization collects a portion or percentage of that money then only that portion can show as income.

Budget Levels cont.

Pass through money is money collected by an organization and then immediately dispersed. Examples include:

- funds collected by an organization that sells art on behalf of an artist and then distributes that money to the individual artist;
- organizations that collect costume fees from individual participants, and then immediately purchase costumes for individual participants;
- money that is collected from individuals for travel purposes, which is then spent on travel.

Some monies spent for fundraising purposes are pass through money. If an organization sells an item for fundraising purposes (for example, wreaths or ornaments), the purchase of those fundraising items cannot be included in the organization's income and expenses. Only the profits from the fundraiser should be included in the income category.

Do not include In-Kind expenses in the budget level calculations.

Level 1 under \$50,000. Level 4 \$250,000-\$500,000

Level 2 \$50,000-\$100,000. Level 5 over \$500,000

Level 3 \$100,000-\$250,000

Budget as a Story

Brenda MacRoberts

Director of Development and Administration

ARTSFAIRFAX

New and Different for FY20

- GMU arts divisions no longer eligible for Operating Support (may apply for project grants)
- Staff list including contact information for key positions
- City based organizations must describe service to county and back up with data
- Arts Directory, Events, and Grantee Ad requirement
- Expanded Accessibility section
- Initial payment will be 70% and final payment will be 30%
- Budget table updates

Review Process

Following the grant application deadline:

- **ARTSFAIRFAX** staff confirms application eligibility and whether an application is complete. Staff may contact applicants for information needed to make an eligibility determination.
- If an application is determined to be ineligible, the application will be rejected without evaluation.
- Incomplete applications are subject to rejection without evaluation. If an application is rejected, the applicant will be notified by e-mail.
- All eligible applications for the Operating Support Program are evaluated by panel review.
- Panelists are arts professionals with a particular knowledge or expertise of the segments of the arts community that are eligible to apply to the **ARTSFAIRFAX** for funding.
- Panel meetings are open to the public and applicants will be notified of the schedule for the panel meeting and are encouraged to attend. We will continue to offer the correction form for those organizations in attendance.

- **ARTSFAIRFAX** Board of Directors makes the final funding decisions on the basis of the evaluations by the panels and the overall goals of the Organizational Professional Development Grant Program and of **ARTSFAIRFAX**.

Role of **ARTSFAIRFAX** staff

- Advises on possible projects and follows up from Operating Support review
- Recruits and assign panelists
- Checks applications for eligibility and completeness
- Compiles panelists scores
- Takes notes at panel and provides feedback upon request
- Develops preliminary funding scenarios
- Provide technical assistance on the online grant portal, Submittable, to applicants and panelists

Evaluations Criteria

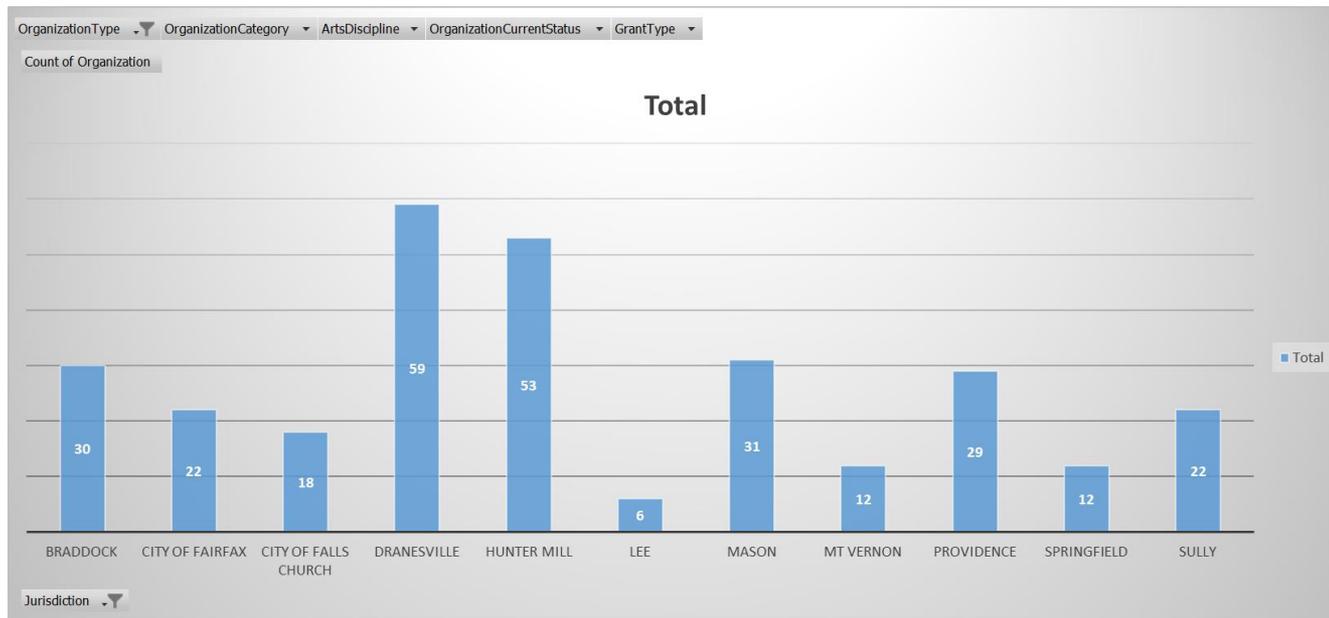
Advisory Review Panels usually comprised of 3-5 individuals who have no conflict of interest, will review and evaluate each eligible application on its own merit. **ARTSFAIRFAX** selects panel members for their diverse backgrounds, expertise in a particular arts discipline, and knowledge of the community. Panelists will evaluate each grant request based on the criteria below:

1. Quality of Programs
2. Community Outreach
3. Organizational Effectiveness
4. Appropriateness of the Budget

Community Outreach Criteria

This table shows the distribution of arts organizations in Fairfax County, City of Fairfax, and City of Falls Church.

The Lee, Mt Vernon, and Springfield Districts are relatively underserved by the arts.



Panel Insights

Strong applications include these characteristics among others:

- Organization designs programs to meet the unique needs and interests of the community, most notable elderly and special needs;
- Shares details on strategic priorities how they are going to be executed and achieved using examples;
- Budget includes diverse revenue streams balanced with a variety of unearned and earned sources, as well as a board giving policy;
- Proposal use of budget narrative to illuminate the connections between the budget and the organization's goals.

More Panel Insights

The panel comments also reflect how well the proposal showcases the quality of programs, organizational effectiveness and community outreach. And they also underscore the weaknesses in applications:

- Lack of awareness of the community —example, no details on how community needs are identified or specific strategies to attract these audiences.
- Differentiate yourself as an organization—clear organizational objectives and data points to support those objectives.
- Diversity is holistic not just one aspect of an organization—it encompasses board and leadership diversity, artistic and ensemble diversity and audience diversity.

The Panelist's Perspective

Melanie Jarratt Wolfe

Fundraising/Nonprofit Consultant

Previous **ARTSFAIRFAX** grant reviewer

Terms & Conditions

Grants recipients must agree to comply with the following conditions of the Operating Support Grant program . (see guidelines for details)

- Duration of a Grant
- Organizational Eligibility
- Amount of Award (\$500-50,000); no more than 15% of actual expenses in budget.
- Addendum
- Cost Sharing: 2:1 match
- Use of Funds
- Acknowledgement of **ARTSFAIRFAX** Funding
- Announcement of Award
- Payment and Reporting Procedures
- Record Keeping
- Cancellation
- Mandatory Participation in Research
- Advocacy Requirements

Acknowledgement of **ARTSFAIRFAX** Funding

All grant recipients are required to acknowledge **ARTSFAIRFAX** funding for the duration of the grant. Your success is our success. By working together we raise the profile of the arts in the county.

ARTSFAIRFAX is your brand umbrella

- Acknowledge **ARTSFAIRFAX** in all print materials and digital communications
- Include appropriate **ARTSFAIRFAX** ad in programs
- Include **#ARTSFAIRFAX** in your social media channels

Cross Promote Your Events:

- Add **ARTSFAIRFAX**'s calendar to your Web site
- Share your activities on **ARTSFAIRFAX** Facebook and Instagram **@ARTSFAIRFAX**

See the Grant Communication Kit @ ww.artsfairfax.org/grants

Required Documents and Supplemental Materials

Required documents –

- IRS Letter of Determination
- Most recent IRS 990 (do not include schedules)
- Treasurer's Report or Audit for most recently completed fiscal year
- Board List with addresses
- Required Tables
- List of key staff, Board members with bios
- Required tables
- Submit required documents in **PDF, DOC, DOCX, JPG, XLS, or XLSX** format. Name the file as TR/A/Budget/ILD/990_Organization Name.

Additional Materials -

- Submit supplemental materials and work samples, including marketing materials, strategic plans, photographs, audio and video links, reviews, testimonials etc. Use Cover Sheet for links to large files.

Appeals Process

Unless there are grounds for an appeal, all funding decisions of the Arts Council are final. **ARTSFAIRFAX** funding decisions may be appealed only upon the following grounds:

1. The Applicant's grant application was denied based on criteria other than those set forth in the applicable guidelines, where the application of such improper criteria was open and obvious and there was also no legitimate basis for denial under the applicable guidelines;
2. The Applicant's grant application was denied based on the grant panel's failure to apply the applicable guidelines, where such failure is open and obvious and not merely a subjective evaluation of the merits of the application;
3. The Applicant's grant application was denied based on the grant panel's failure to consider relevant evidence presented in support of the grant application, where such failure was both open and obvious and not merely the result of the Applicant's failure to properly identify or present such evidence; and/or
4. The Applicant's grant application was denied as the direct result of an undisclosed conflict of interest between the Applicant and a member of the grant panel, where, but for such conflict, the Applicant's grant application would not have been denied.

Grant Writing Tips

- Create and edit narrative and text offline and then copy & paste into the online application.
- Write clearly and concisely.
- Do not use jargon.
- Remember that the people who are reading your application may know nothing about your organization or your programs.
- Check narrative and other text for grammar and spelling errors.
- Do not repeat information in different narrative sections.
- Keep in mind that **ARTSFAIRFAX** staff does not participate in panel discussions. The application must stand on its own merits.

Grant writing tips Cont'd

- Be sure that when a reader has finished reviewing your grant application, s/he will know your organization and understand the project.
- Verify that all contact information in your application is correct, including e-mail addresses and phone numbers.
- Financial information referred to in the narrative should match the numbers on the Financial Form.
- See model applications, previous recipients, and other resources on **ARTSFAIRFAX** website – **Grants Page**.
- Refer to the Help field in the online application.
- Use **ARTSFAIRFAX** as a resource. If you have any questions, call at (703) 642-0862, ext. 1 or ext. 6, or e-mail to grants@artsfairfax.org.

Grant timeline

- March 20, 2019 – Application Deadline
- May 15-17, 2019 – Panel Meeting
- July 2019 - Announcement of awards and 70% payment
- August 1, 2020 - Final Report Due
- September 2020 - Final 30% payment

Resources

See artsfairfax.org for these resources:

- Operating Support Grant Guidelines
- Operating Support Grant Sample Application
- Operating Support Grant Online Application Instructions
- Recent Recipients of Operating Support Grants
- Audience Survey Template for Nonprofit Arts Organizations
- Grant Communications Kit and Branding Guide
- Submittable Help Desk 855-467-8264 x2 or x4

Submitting your application

Go to: <https://artsfairfax.submittable.com/submit>

Refer to the **FY20 Operating Support Submittable Online Instructions**

Operating Support applications must be submitted on-line, no later than *March 20, 2019* at midnight.

Late applications will not be accepted.

Thank You

Contact us

Lisa Mariam

Director of Grants

ARTSFAIRFAX

2667-A Prosperity Avenue,
Suite A, Fairfax, VA 22031

Office: 703-642-0862 x1

Direct: 571-395-4617

Fax: 703-712-8599

lmariam@artsfairfax.org

<http://artsfairfax.org>

Kimber Craine

Grants Manager

ARTSFAIRFAX

2667 Prosperity Avenue, Suite
A, Fairfax, VA 22031

Office: 703-642-0862 x6

Direct: 571-395-4618

Fax: 703-712-8599

kcraine@artsfairfax.org

<http://artsfairfax.org>