Creative Space-Planning (CRSP-Planning)

How to submit your application

Application Instructions

Applications are available online at:

[**sf.culturegrants.org**](http://sf.culturegrants.org) (detailed log-in instructions on the next page)

**Deadline to apply:** 12 pm noon PST on Wednesday, October 25, 2017.

Applications must be received online via the link above. Hard copy, postal mail, and faxed applications will not be accepted. In fairness to others, we cannot accept late or incomplete applications. An application may be deemed incomplete and ineligible if the individual does not provide the complete set of information in the appropriate format by the deadline. No deadline extensions will be granted.

Submission Guidelines

This document provides step by step instructions of how to fill the application. If you have any questions about the application, please contact Program Officer Robynn Takayama 415-252-2239 or robynn.takayama@sfgov.org.

PLEASE NOTE: The online grant application form ([**sf.culturegrants.org**](http://sf.culturegrants.org)) limits entry based on the defined character count for each question. **We strongly advise you to prepare your narrative draft in a separate document and then paste the completed answers into the form when you are ready to submit the application.** If you draft your narrative directly online, it’s possible that you could lose some of your responses.

Grants Management System ("GMS") Instructions

New applicant organizations will need to **Sign-Up** and create an account in the GMS with appropriate username and password. This account should be created by an authorized representative of the applicant organization. Please create a generic username that represents your organization as the username CANNOT be changed. Account information should be reflective of the applicant organization and not external parties such as a fiscal sponsor or contracted grants writer.

You do not need to sign up again if your organization has created an account. Go to the **Log-In** page and enter your username and password. If you forget your password or unsure of your username or password, please use the **Forgot Your Password** option to reset your password.

Create an Account in the GMS

User Information (1/3)

**CONTACT PERSON:** Enter the name of the person responsible for executing the grant and communicating with SFAC.

**CORPORATE ADDRESS IN SAN FRANCISCO:** Enter the physical corporate address of the organization applying for the grant. The organization must have a corporate address in San Francisco to be eligible for funding. Post Office Box addresses will not be accepted. You will be required to attach proof of corporate address.

**DAY PHONE:** Enter the contact number(s) for the individual responsible for communicating with SFAC.

**EMAIL:** Enter the contact email of the individual responsible for communicating with SFAC. Please ensure that this address is up to date since most communications from SFAC is via email.

**USERNAME:** Create a generic username that represents your organization as the username CANNOT be changed.

**PASSWORD:** You must follow these four rules:

* Minimum 8 characters (case sensitive)
* Minimum 1 numeric character
* Must have 1 uppercase letter
* Must have 1 special character (e.g. @, !, or \*)

**ASSOCIATE ACCOUNT WITH AN ORGANIZATION:** When asked at the bottom of the page “would you like to associate this user account with an organization” select YES. This will allow the system to associate your Username as an organization, and give you access to SFAC’s grants applications for organizations.

**SLIDER:** Drag the slider to prove that you're a human.

**SUBMIT:** This will bring you to the organization's information page.

Organization Information (2/3)

**ORGANIZATION ROLE:** All applicants must select DISTRIBUTOR/DIRECT RECEIVER. All organizations are required to have a 501(C)(3) to qualified.

**FEIN NUMBER:** Do not fill in your FEIN number. Please leave this field blank

**ORGANIZATION NAME:** Enter the Applicant Organization’s legal name as registered with the IRS or name the organization uses for business purposes. If the organization is a project, department, or line item in the budget of a larger organization, give the larger organization’s name, followed by “dba” (doing business as) and the organization’s project or department name, for example, The City of Buena Vista dba The Buena Vista Arts Council.

**ADDRESS:** Enter the physical corporate address of the organization applying for the grant. The organization must have a corporate address in San Francisco to be eligible for funding. Post Office Box addresses will not be accepted. You will be required to attach proof of San Francisco corporate address showing the applying organization's name on an official document. (Reenter CORPORATE ADDRESS IN SAN FRANCISCO)

**PHONE:** Enter the contact number for the individual responsible for communicating with SFAC.

**FAX PHONE NUMBER:** If applicable.

**WEBSITE:** Enter organization’s website.

**NUMBER OF THE SUPERVISOR'S DISTRICT IN WHICH YOUR ORGANIZATION OPERATES:** District numbers can be found at: [propertymap.sfplanning.org](http://propertymap.sfplanning.org).

**SUPPLIER NUMBER:** (Formally known as a ‘Vendor’ number). If known**.**

**VALIDATE AND SUBMIT:** This will bring you to the terms and conditions page.

Terms and Conditions (3/3)

**DO YOU AGREE WITH ALL THE TERMS AND CONDITIONS ABOVE:** You must agree with the terms and conditions before creating an account.

Eligibility

**IS YOUR ORGANIZATION A 501(C)(3) ARTS ORGANIZATION?**: All organizations are required to have a 501(C)(3) and be in good standing with the IRS as a tax-exempt organization to qualify.

**IS YOUR ORGANIZATION BASED IN SAN FRANCISCO?**: You will be required to attach proof of San Francisco corporate address in Supporting Materials. Proof of address must be a timely document, such as a telephone bill, electric bill or bank statement that includes the name of the organization applying for the grant.

**IS YOUR ORGANIZATION’S MISSION STATEMENT CLEARLY FOCUSED ON THE DEVELOPMENT, PRODUCTION, AND/OR PRESENTATION OF ARTS ACTIVITIES IN SAN FRANCISCO?**: The organization’s mission statement must be clearly focused on the development, production, and/or presentation of arts activities in San Francisco.

**IS YOUR ORGANIZATION PART OF ANOTHER CITY AGENCY OR DEPARTMENT?:** The applicant organization cannot be part of another City agency or department.

**HAS YOUR ORGANIZATION HELD FOUR PUBLICALLY ACCESSIBLE ARTS ACTIVITIES FOR TWO YEARS:** Please note, to be eligible for this grant, you must have held four publicly accessible events that span from October 2015 to the grant deadline. You will be asked to upload your organization’s list of art activities for the past two years in the Supporting Materials section of the application.

**IS YOUR ORGANIZATION’S THREE-YEAR AVERAGE ANNUAL OPERATING BUDGET LESS THAN $2 MILLION IN INCOME (DETERMINED BY THE LINE REVENUE LESS IN-KIND MINUS NON-OPERATING REVENUE IN THE SFAC DATA ARTS REPORT)?:** The organization’s three-year-average annual operating budget must not exceed $2 million in income or expense. The annual operating budget is inclusive of pass through funds that are re-granted to other organizations, which is generally applicable for organizations that provides fiscal sponsorship support to other organizations. The annual operating budget is not inclusive of funds received or expended for capital projects.

**IS YOUR ORGANIZATION IN DEFAULT FOR ANY GRANTS OR LOANS FROM SFAC, OTHER CITY DEPARTMENTS, NORTHERN CALIFORNIA GRANTMAKERS ARTS LOAN FUND, NORTHERN CALIFORNIA COMMUNITY LOAN FUND, COMMUNITY ARTS STABILIZATION TRUST, OR THE CENTER FOR CULTURAL INNOVATION?:** Applicants must not be in default on any grants or loans from: (1) SFAC, (2) other City departments (including, without limitation, Department of Children, Youth, and their Families; Office of Economic and Workforce Development; Mayor’s Office of Housing and Community Development; and Grants For The Arts), (3) Northern California Grantmakers Arts Loan Fund; (4) Northern California Community Loan Fund, (5) Community Arts Stabilization Trust; or (6) the Center for Cultural Innovation. This default clause was expanded due to the fact that SFAC has a fiduciary relationship with these particular organizations, through either shared City resources or other pooled philanthropic funds.

**IS THE PROPERTY WHERE THE PROPOSED PROJECT WILL OCCUR IN SAN FRANCISCO?:** The proposed project must take place within the City and County of San Francisco.

**IS THE DURATION OF YOUR PROPOSED PROJECT DURING JULY 1,**

**2018-JUNE 30, 2019?**:The proposed project must take place in San Francisco between July 1, 2018 and June 30, 2019.

**IS YOUR ORGANIZATION WILLING AND ABLE TO MEET THE REQUIREMENTS ASSOCIATED WITH RECEIVING FUNDS FROM THE CITY AND COUNTY OF SAN FRANCISCO?:** In order to receive a grant from the San Francisco Arts Commission, you must become a registered, compliant supplier (formerly called a vendor) and meet the City of San Francisco's insurance and business tax requirements. For more information about supplier requirements, visit: [sfgov.org/oca/qualify-do-business](http://sfgov.org/oca/qualify-do-business). Please note if you are not already a City supplier, you will only be required to register if you are awarded a grant. Insurance and business tax requirements will be explained and made available upon approval of grant awards.

Organizational Information

Some fields will auto-populate with the information you provided when you created a login and username. If you would like to overwrite information (for example, change the email address from the development person's email to the executive director's email), you may do so by entering new information into the fields on this page.

**GRANT APPLICANTORGANIZATION NAME:** Enter the name of the organization applying for the grant. If this is a collaboration that includes multiple entities, only

include the name of the primary organization that will be the signatory on the grant.

**FIRST NAME:** Enter the first name of the person responsible for executing the grant and communicating with SFAC.

**LAST NAME:** Enter the last name of the person responsible for executing the grant and communicating with SFAC.

**TITLE:** Enter title of the person responsible for executing the grant and communicating with SFAC.

**SF CORPORATE ADDRESS:**

**ADDRESS 1:** Enter the physical corporate address of the organization applying for the grant. The organization must have a corporate address in San Francisco to be eligible for funding. You will be required to attach proof of San Francisco corporate address with the applying organization’s name on an official document. You will be required to attach proof of San Francisco corporate address in Supporting Materials. Post Office Box addresses will not be accepted. Proof of address must be a timely document (from the past three months), such as a telephone bill, electric bill or bank statement that includes the name of the organization applying for the grant.

**ADDRESS 2:** Only use this if you require a second line for your address.

**CITY:** Enter the city for the physical corporate address of the organization applying for the grant.

**STATE:** Enter the state for the physical corporate address of the organization applying for the grant.

**ZIP**: Enter the zip for the physical corporate address of the organization applying for the grant.

**NUMBER OF THE SUPERVISOR’S DISTRICT** in which your organization operates: District numbers can be found at: [propertymap.sfplanning.org](http://propertymap.sfplanning.org)

**MAILING ADDRESS (IF DIFFERENT)**: Enter the mailing address of the applicant if different from the physical address.

**ADDRESS 2:** Only use this if you require a second line for your mailing address.

**CITY:** Enter the city for the mailing address of the organization applying for the grant.

**STATE:** Enter the state for the mailing address of the organization applying for the grant.

**ZIP:** Enter the zip for the mailing address of the organization applying for the grant.

**EMAIL:** Enter the contact email of the individual responsible for communicating with SFAC. Please ensure that this address is up to date since most communications from SFAC are via email.

**PHONE:** Enter the contact number for the individual responsible for communicating with SFAC.

**WEBSITE:** Enter the organization’s website URL.

**ARE YOU APPLYING FOR THE NATIVE AMERICAN ARTS AND CULTURAL TRADITIONS GRANT (NAACT-CRSP-P): YES** means your application will be reviewed by a panel of community members that represent the Native American community in San Francisco. **NO** means this is not applicable to your application.

Project Information

**GRANT REQUEST AMOUNT:** Organizations may ask for no more than 50 percent of the three-year average of their operating budget income (determined by the line: Revenue Less In-kind minus Non-operating Revenue in the SFAC DataArts Report) or up to $50,000, whichever is less.

**SFAC DATAARTS REPORT AMOUNT:** Enter the Revenue Less In-Kind minus Non-operating Revenue line item on page four of the SFAC DataArts Report. Organizations can request no more than 50 percent of this data point.

**PROJECT SUMMARY:** Provide a brief summary of the proposed project in 600 characters or less that starts with "SFAC funds will be used to support." For example: SFAC funds will be used to support a feasibility study for the acquisition of a permanent rehearsal facility in San Francisco, identification and site analysis, overall plan development, and to pre-plan a capital campaign. Acquisition of a permanent home will alleviate operational challenges for the organization and leverage a substantial bequest received in 2016.

Alignment with SFAC Goals

**MISSION STATEMENT (500 CHARACTERS MAX):** The organization’s mission statement must be clearly focused on the development, production, and/or presentation of arts activities in San Francisco.

**SFAC’S GOALS FOR EQUITABLE GRANTMAKING:** Select **one** of SFAC’s goals for equitable grantmaking that best align with your organization. SFAC seeks to support organizations that:

* **Capacity Building:** Build capacity, resilience and economic viability of individual artists from historically marginalized communities.
* **Accessibility:** Provide a space to access art and creativity for historically marginalized communities.
* **Cultural Integrity:** Create or present work that demonstrates integrity and ethical use of material with specific cultural origins and context.
* **Intersectionality:** Address how race, gender, sexuality, ability, socioeconomic status, immigration status, religion, class, etc. are interconnected through artistic programming or process.

Note: Priority funding goes to organizations that foster artistic expression deeply rooted in and reflective of historically marginalized communities. Using both the Cultural Equity Endowment Legislation and the Grantmakers in the Arts’ “Racial Equity: Statement of Purpose,” these communities include: African and African American; Latino/a; Asian and Asian American; Arab; Native American; Pacific Islander; Lesbian, Gay, Bisexual, Queer; Transgender and Gender Variant People; People with Disabilities; and Women. (SF ADMIN. CODE CHAPTER 68: CULTURAL EQUITY ENDOWMENT FUND. Sec. 68.6. PROJECT GRANTS).

**Please note:** We recognize that some marginalized communities may not be listed here and encourage applicants to articulate and provide supporting evidence about the marginalization for any community not named above. Please also note the legislation pertains to marginalized communities and not fringe artistic disciplines.

**Who does your organization serve and why? How does your organization meet the needs of the communities you serve? (3000 CHARACTERS MAX):** This should expand upon your mission statement. Applicants are encouraged to refer to demographic data and community engagement strategies where appropriate.

**Using detailed explanation and examples, describe how your organization aligns with the selected goal. (2000 CHARACTERS MAX):** Applicants should expand upon the organization’s core philosophies, not the proposed project.

**Describe the leadership team and staff’s relevant experience and qualifications working in the communities you serve. (2000 CHARACTERS MAX):** Please answer in relation to the organization’s leadership team (such as the executive director, managing director, artistic director, and/or board president) and not project staff (if different from core staff).

Artistic History

**Describe your organization’s history and highlight major accomplishments (3500 CHARACTERS MAX):** Outline moments in the organization’s history that exemplify the implementation of its mission, values and vision. Strong proposals will demonstrate a deep connection to communities identified in the Cultural Equity Endowment Legislation and the Grantmakers in the Arts “Racial Equity: Statement of Purpose.”

Quality of Proposed Project

**DESCRIBE THE PROPOSED PLANNING PROJECT. WHY IS IT NECESSARY AND WHAT ARE THE PROJECT GOALS (1950 CHARACTERS MAX)?** Strong proposals demonstrate need for the project with achievable goals that address the articulated need.

**WHAT PREPARATORY WORK HAS YOUR ORGANIZATION DONE TO BE AT THIS STAGE OF PLANNING (1400 CHARACTERS MAX)?** Strong proposals demonstrate the organization’s thoughtful preparation to engage in this project with consideration to staff and organizational capacity.

**DESCRIBE HOW THE PROPOSED PROJECT WILL ADVANCE THE ORGANIZATION'S MISSION AND FUTURE DIRECTIONS (1400 CHARACTERS MAX).** Strong proposals will demonstrate the impact the project will make on the organization and their service to the community.

**GRANT PLAN TEMPLATE:** The Grant Plan outlines the primary activities that will take place during the grant window and the targeted outputs that the applicant hopes to achieve.

**ACTIVITY COLUMN:** Applicants should break down the proposed project into no more than six primary activities. Each of these activities should be described succinctly in one sentence and clearly outline the steps needed to ensure a successful outcome.

**OUTPUTS COLUMN:** The Outputs Column represents the targeted quantitative measure for the corresponding activity. For example, this may be the number of artists that will be paid, the number of workshops that will be held, the number of rehearsals held, or the number of performances given.

**COMPLETED BY COLUMN:** Each activity listed should have a targeted completion date that falls within the grant window.

**EXAMPLE:**

|  |  |  |
| --- | --- | --- |
| **Activity** | **Outputs** | **Completed by:** |
| Complete fundraising campaign | All funds in-hand | 7/1/17 |
| Perform market and site financial analysis | Pertinant market and site financial analyses and reports are completed to inform project | 10/31/17 |
| Acquire site | Lease is signed | 10/31/17 |
| Conduct design and engineering phase | Design of new space is complete | 1/31/18 |
| Submit SFAC final report | 1 Final Report | 7/30/18 |

Ability to Complete the Project

The applicant is required to fill out two budget templates: Total Project Budget & Notes and SFAC Grant Budget & Notes. The applicant is required to fill out two budget templates: Total Project Budget & Notes and SFAC Grant Budget & Notes. If you would like to download the budget templates as an Excel spreadsheet, [follow this link](http://www.sfartscommission.org/CAE/grants/grant-programs-and-applications/), however you still must complete the budget in the GMS.

Instructions on how to fill out SFAC budget templates are below.

TOTAL PROJECT BUDGET & NOTES: This budget should represent the TOTAL revenue and expenditures for the entire project. The Project Budget & Notes help panelists to understand the breadth and full cost of your project. **Please note: If project net does not correctly auto-calculate at first, save the page and the sum should update.**

**Total Project Budget: CONTRIBUTED INCOME**

For each line item under CONTRIBUTED INCOME, include notes that indicate the source of funding, if the organization has received funding from this source before, and whether the amounts are pending or secured for the proposed project.

|  |  |  |
| --- | --- | --- |
| **Category** | **Notes** | **Costs** |
| **Project Income** |  |  |
| **Contributed** |  |  |
| **SFAC Grant Requested** | Pending; received an OPG in 2016 | **$ 50,000** |
| **Government-Federal** | NEA grant: secured | **$ 10,000** |
| **Government-State** | CAC grant: pending | **$ 5,000** |
| **Government-Local/Municipal** | SF City DCYF grant: secured | **$ 10,0000** |
| **Business/Corporations** | Target: secured | **$ 5,000** |
| **Foundations** | Rainin Foundation: pending. (Received a grant in 2014) | **$ 10,000** |
| **Individuals** | 5 Board members at $300 each: secured | **$ 1,500** |
| **Fundraising** | Annual Gala: pending; raised $25,000 at last year’s gala | **$ 20,000** |
| **Other (including in-kind and volunteer)** | In-kind marketing consultant developing outreach plan $2,000; volunteer ushers (2/show) and box office manager | **$ 2,000** |
|  |  |  |
|  | **Subtotal Contributed:** | **$ 83,500** |

**Total Project Budget: EARNED INCOME**

For each line item under EARNED INCOME, include notes that indicate the source of funding, if the projected amounts are based on previous efforts and whether the amounts are pending or secured for the proposed project.

|  |  |  |
| --- | --- | --- |
| **Category** | **Notes** | **Costs** |
| **Earned** |  |  |
| **Admission/ticket sales** | 100 tickets at $15 each: pending (based on prior year’s event) | **$ 1,500** |
| **Tuitions/workshops/lecture fees** | 5 workshops at $20 per person at 20 people | **$ 2,000** |
| **Product sale/concessions** | Merchandise sales: pending (estimated based upon anticipated number of audience of 100) | **$ 5,000** |
| **Contracted services/performance fees** |  | **$ 0** |
| **Other** |  | **$ 0** |
|  |  |  |
|  | **Subtotal Earned:** | **$ 8,500** |
|  | **Total Project Income (Contributed +Earned):** | **$ 92,000** |

**Total Project Budget: PROJECT EXPENSE**

The PERSONNEL category is used to list all supervisory, direct staff and support/clerical staff that work directly on the funded project. These are positions that are ongoing and vital to the organization and do not include stipends, honorariums, temporarily contracted services, or artist fees, which are reported elsewhere.

Expenditures should be based on total projected project expense. Notes should clearly outline who will be paid based upon an hourly rate and FTE of annual salary.

|  |  |  |
| --- | --- | --- |
| **Category** | **Notes** | **Costs** |
| **Project Expense** |  |  |
| **Personnel** |  |  |
| **Salaries/wages** | Executive Director: 520 hours at $26 per hour per year (.25 of annual salary of $55,000 = $13,500) | **$ 13,500** |
| **Benefits** | 10 percent of Executive Director’s wages | **$ 1,300** |
|  |  | **$ 0** |
|  | **Subtotal Personnel:** | **$ 14,300** |

**Total Project Budget: OPERATING EXPENSES**

Expenditures should be based on total projected project expense. Notes should clearly outline the details of each line item. Please see examples below.

|  |  |  |
| --- | --- | --- |
| **Category** | **Notes** | **Costs** |
| **Operating Expenses** |  |  |
| **Fees: Administrative** | Stipends to cover administrative tasks related to the project (2 individuals at $20 hour for 10 hours=$400) | **$ 400** |
| **Commission fees/honorariums: Artistic** | Guest curator stipend ($1,000 flat fee); Artist honorariums to participate in the show (5 at $200 each = $1,000); Workshop presenters (3 at 4 workshops at $50 each =$600) | **$ 1,600** |
| **Fees: Technical / Production** | Photographer to document 2 performances ($500 flat fee); AV Tech (10 hours at $100 per hour = $1,000) | **$ 1,500** |
| **Advertising/marketing** | Costs associated with publicizing new production: promotional postcards ($500); postage ($200); banner ($300) = $1,000 | **$ 1,000** |
| **Equipment rental** | Costs associated with new production: lighting ($500); AV equipment ($1,000); sound system ($1,500) = $3,000 | **$ 3,000** |
| **Facilities/space rental** | Costs for renting theater for 2 days for rehearsal and presenting new production: $2,000 | **$2,000** |
| **Fundraising expenses** | Costs for creating a development brochure: printing ($500); postage ($200) = $700 | **$700** |
| **Insurance** | One time coverage for the presentation of the new production = $1,000 | **$1,000** |
| **Internet/website** | 10 percent cost allocation for monthly website costs = $100 | **$100** |
| **Office supplies** | General office supplies to support the new production. | **$200** |
| **Production/exhibition costs** | Costs associated with the new production: Props ($200); costumes (5 performers at $300 each = $1,500) = $1,700 | **$1,700** |
| **Program costs** | General supplies to build new sets, including paint and lumber ($1,000) | **$1,000** |
| **Professional services** | Costs for graphic artist to design banner, promotional postcards, and development brochure: $1,000 | **$1,000** |
| **Software/hardware** | New laptop ($2,000) to support lighting design software ($200) to be used in the new production. Half covered by SFAC grant | **$2,200** |
| **Other** | Catering and beverages (covered by Target grant); volunteer ushers and box office manager; in-kind marketing consultant ($2,000) | **$2,500** |
|  |  |  |
|  | **Subtotal Operating Expenses:** | **$ 19,900** |

**Total Project Budget: SUBCONTRACTORS**

Expenditures for SUBCONTRACTORS should be based on total projected project expense. Notes can be more general: the name of the contractor and details about hourly costs and deliverables should be provided in the SFAC GRANT BUDGET & NOTES.

|  |  |  |
| --- | --- | --- |
| **Category** | **Notes** | **Costs** |
| **Subcontractors** | General Contractor ($35,000); Strategic Planning Consultant ($15,000); Evaluation Consultant ($6,000) | **$ 56,000** |

**Total Project Budget: PROJECT NET**

The amount under PROJECT NET equals TOTAL PROJECT INCOME minus TOTAL PROJECT EXPENSES. The amount shown under PROJECT NET can either be zero, which indicates that income and expenses are equal, or it can show a modest surplus.

|  |  |  |
| --- | --- | --- |
| **Category** |  | **Costs** |
|  | **Total Project Income**  | **$ 92,000** |

|  |  |  |
| --- | --- | --- |
| **Category** |  | **Costs** |
|  | **Total Project Expenses** | **$ 90,200** |

|  |  |  |
| --- | --- | --- |
| **Category** |  | **Costs** |
|  | **Project Net** | **$ 1,800** |

**PROPOSED SFAC GRANT BUDGET & NOTES:**This template is for the expenditures that you would like SFAC to cover. **Please note: The Total Project Expenses for the Project Budget above should equal to or more than Total Proposed Grant Budget.**

**Budget Category: PERSONNEL**

The PERSONNEL category is used to list all supervisory, direct staff and support/clerical staff that work directly on the funded project. These are positions that are ongoing and vital to the organization and do not include stipends, honorariums, temporarily contracted services, or artist fees, which are reported elsewhere.

**Category Instructions:**

* All salaries must be provided as an estimated number of hours dedicated to the project and the hourly rate, as well as the percentage of full-time equivalents (FTE).
* Costs should only reflect the portion that will be paid through the SFAC grant, if approved.
* FTE should be calculated based upon a full-time salary (2,080 hours/year), even if the position is on a part-time basis.
* If the grant is for a two year period (CEI & CRSP-L2), distinguish the expenses that will incur in the first year from the second year in the NOTES column: the COSTS column should include the totals for both years.

**Examples of allowable expenses:**

* A portion of program staff salary overseeing the proposed project.
* A portion of the executive director’s salary to support oversight of the project.
* Administrative support to the project.

**Examples of disallowable expenses for this budget category:**

* Artist stipends or fees.
* Temporary, contracted services for technicians.
* Staff who are primarily volunteer and receive small stipends for their work. These expenses should go under COMMISSION FEES/HONORARIUMS

**Acceptable documentation for this budget category:**

* Payroll records, either internal or from a payroll service.

**EXAMPLE (Two-year grant: CEI & CRSP-L2):**

|  |  |  |  |
| --- | --- | --- | --- |
| **Category** | **Notes** | **FTE** | **Costs** |
| **Personnel:** |
| **Position/Title:** Madeline Khan, Executive Director | 400 hours at $33 per hour per year (.20 of annual salary of $69,000 times 2 years =$26,400): to oversee the strategic planning process | **.20** | $26,400 |
| **Position/Title:** Chris Rock, Program Director | 520 hours at $26 per hour per year (.25 of annual salary of $55,000 times 2 years = $27,040): to support oversight of the strategic planning process  | **.25** | $27,040 |
| **Position/Title:** Geraldine Wilson, Administrative Assistant | 208 hours at $19 per hour in year one only (.10 of annual salary of $40,000=$3,952): to provide administrative support to the strategic planning process | **.10** | $3,952 |
|  | **Subtotal Personnel:** | **$47,392** |

**Budget Category: FRINGE BENEFITS**

The FRINGE BENEFITS category is used to list expenses directly related to employment. We highly encourage organizations to provide some form of health care to their staff. Also, individual artists may allocate a portion of their commission to health care costs.

**Category Instructions:**

* For organizations, costs can be shown either as a percentage of salary costs listed under PERSONNEL, or as a per person cost in the case of a health care stipend.
* For individuals, costs can be shown either as a percentage of total costs paid or the full costs of health care.
* Costs should not exceed 10 percent of the entire grant amount.
* Costs should only reflect the portion that will be paid through the SFAC grant, if approved.
* Costs should be comparable to the FTE portion covered by the grant.
* If the grant is for a two year period (CEI & CRSP-L2), distinguish the expenses that will incur in the first year from the second year in the NOTES column: the COSTS column should include the totals for both years.

**Examples of allowable expenses:**

* FICA and SUI
* Workers Compensation
* Health Benefits

**Examples of disallowable expenses for this budget category:**

* Vacation, sick time, or over time accruals for prior fiscal year.
* Taxes or other amounts withheld from wages or salaries which have not actually been paid by grantee during the term of the grant agreement or which related to periods before or after the term of the grant agreement.

**Acceptable documentation for this budget category:**

* Payroll records, either internal or from a payroll service.
* Invoices from a health insurance provider.
* Invoice from employee for the health stipend
* Statement from a retirement benefit provider.

**EXAMPLE:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Category** | **Notes** |  | **Costs** |
| **Fringe Benefits:** |
| **Position/Title:**Madeline Khan, Executive Director | 10 % of $13,200 for full health care coverage |  | $1,320 |
| **Position/Title:** Chris Rock, Program Director | 15% of $12,000 annual cost of health care coverage |  | $1,800 |
| **Position/Title:**Ai Wei Wei, Artist | $150 per month for 12 months cost for Affordable Healthcare Coverage |  | $1,800 |
|  | **Subtotal Fringe Benefits:** | **$4,920** |

**Budget Category: COMMISSION/ FEES/HONORARIUMS**

The COMMISSION FEES/HONORARIUMS line items include costs associated directly with the proposed project. Individuals that are either salaried or hourly and are considered to be employees of the organization, such as executive directors, artistic directors, managing directors or administrative assistants, should be indicated under PERSONNEL unless they are primarily volunteers and receive small stipends for their work.

**Category Instructions:**

* The amounts should only reflect the portion that will be paid through the SFAC grant, if approved.
* If the grant is for a two year period (CEI & CRSP-L2), distinguish the expenses that will incur in the first year from the second year in the NOTES column: the COSTS column should include the totals for both years.

**Examples of allowable expenses:**

* Administrative: Stipends to individuals to support the administrative component of the proposed project.
* Artistic: Curator fee; guest choreographer fee; honorariums to artists to participate in a show.
* Technical & Production: Photographer to document a workshop; audio/visual technician to set up sound for a performance.

**Examples of disallowable expenses for this budget category:**

* Payments to individuals that are part of the organization’s staff.

**Acceptable documentation for this budget category:**

* Invoice from the administrator, artist or technician.

**EXAMPLE:**

|  |
| --- |
| **Operating Expenses:** |
| **Category**  | **Notes** | **Costs** |
| **Fees: Administrative** | Stipends to cover administrative tasks related to the project (2 individuals at $20 hour for 10 hours=$400) | $400 |
| **Commission Fees / Honorariums: Artistic** | Guest Curator stipend ($1,000 flat fee); Artist honorariums to participate in the show (5 at $200 each = $1,000); Workshop presenters (3 at 4 workshops at $50 each =$600) | $2,600 |
| **Fees: Technical & Production** | Photographer to document 2 performances ($500 flat fee); AV Tech (10 hours at $100 per hour = $1,000); | $1,000 |

**OPERATING EXPENSES**

**Category Instructions:**

* Costs should only reflect the portion that will be paid through the SFAC grant, if approved.
* Notes should clearly indicate how the expenses support the activities outlined in the Grant Plan.
* If the grant is for a two year period (CEI & CRSP-L2), distinguish the expenses that will incur in the first year from the second year in the NOTES column: the COSTS column should include the totals for both years.

**Examples of allowable expenses:**

* Advertising & marketing: promotional materials; printing costs; banner ads.
* Equipment rental: lighting rental or AV rental for a production.
* Facilities/space rental: a cost allocation for the organization’s space; theater rental for a performance; classroom rental for workshops.
* Fundraising expenses: (CEI & CRSP-P only) costs associated with a special event; postage and printing for development materials.
* Insurance: a cost allocation for general liability, automobile and/or workers compensation; cost for one-time liability coverage for a special event.
* Internet/website: a cost allocation for hosting a domain.
* Office supplies: general office supplies used by staff in the operation of the program.
* Production/exhibition costs: general materials and supplies for mounting a new exhibit; costumes.
* Program costs: art supplies; instruments; music CDs; video equipment integral to the artistic practice.
* Professional services: payments to professionals for a highly technical or specialized service, such as: website developer; computer programmer; lighting designer.
* Software/hardware: editing software; CSM database.
* Other: allowable expenses not covered in the aforementioned line items. Details and explanation are required.

**Examples of disallowable expenses for OPERATING COSTS:**

* Costs associated with payroll for an employee of the organization.
* Catering or beverage expenses.

**Acceptable documentation for this budget category:**

* Invoices and proof of payment.

**EXAMPLE:**

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| --- |
| **Operating Expenses:** |
| **Category** | **Notes** | **Costs** |
| **Advertising & Marketing** | Costs associated with publicizing new production: promotional postcards ($500); postage ($200); banner ($300) = $1,000 | $1,000 |
| **Equipment Rental** | Costs associated with new production: lighting ($500); AV equipment ($1,000); sound system ($1,500) = $3,000 | $3,000 |
| **Facilities / Space Rental** | Costs for renting theater for 2 days for rehearsal and presenting new production: $2,000 | $2,000 |
| **Fundraising Expenses** | Costs for creating a development brochure: printing ($500); postage ($200) | $700 |
| **Insurance** | One time coverage for the presentation of the new production ($1,000) Half covered by SFAC grant = $500 | $500 |
| **Internet/website** | 10 percent cost allocation for monthly website costs = $100 | $100 |
| **Office supplies** | General office supplies to support the new production. | $200 |
| **Production / exhibition costs** | Costs associated with the new production: Props ($200); costumes (5 performers at $300 each = $1,500) | $1,700 |
| **Program costs** | General supplies to build new sets, including paint and lumber ($1,000) | $1,000 |
| **Professional services** | Costs for graphic artist to design banner, promotional postcards, and development brochure: $1,000 | $1,000 |
| **Software / hardware** | New laptop ($2,000) to support lighting design software ($200) to be used in the new production. Half covered by SFAC grant | $1,100 |
| **Other** | N/A | $0 |

**Budget Category: SUBCONTRACTORS**

**Category Instructions:**

* Costs should only reflect the portion that will be paid through the SFAC grant, if approved.
* Subcontractors are non-staff individuals, organizations or companies that provide a service directly in fulfillment of the activities outlined in the Grant Plan and are required to uphold contractual obligations.
* Each service should be provided as an estimated number of hours dedicated to the project and the hourly rate wherever possible.
* If the grant is for a two year period (CEI & CRSP-L2) then distinguish the expenses that will incur in the first year from the second year in the Notes column: the Costs column should include the totals for both years.

**Examples of allowable expenses:**

* HVAC contractor to upgrade the air conditioning system in a theater.
* General contractor to upgrade restrooms to be ADA compliant.
* Consultant to lead a year-long strategic planning process for the organization.
* Evaluator to develop a comprehensive evaluation strategy for the organization.

**Examples of disallowable expenses for OPERATING COSTS:**

* An employee of the organization working to meet the deliverables of the Grant Plan.

**Acceptable documentation for this budget category:**

* Signed contract or MOU containing a clear scope of work and rate of compensation.
* Invoice

**EXAMPLE:**

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| --- |
| **SUBCONTRACTORS** |
| **Category** | **Notes** | **Costs** |
| **Name:** P. Rogers Nelson, General Contractor | Bathroom upgrades to comply with ADA standards: Permits ($1,000); materials ($10,000); labor ($20,000); contingency ($4,000) = $35,000 | $35,000 |
| **Name:** R. Asawa, Consultant | Strategic planning consultant to lead the organization, board of directors, and stakeholders through a year-long planning process: 200 hours @ $75 per hour = $15,000 | $15,000 |
| **Name:** Y. Kochiyama, Consultant | Evaluation consultant to develop a comprehensive evaluation plan for the organization’s programming: 100 hours @ $60 per hour = $6,000 | $6,000 |

**Budget Category: ADMIN / INDIRECT**

**Category Instructions:**

* A maximum of 10 percent of the total grant award is allowable.

**Examples of allowable expenses:**

* A cost allocation for janitorial services.
* A cost allocation for utilities.
* A cost allocation for accounting or payroll services.
* Audit expense.

**Examples of disallowable expenses for this budget category:**

* Costs that are represented in other line items.

**Acceptable documentation for this budget category:**

* No documentation is required for this line item.

**KEY PERSONNEL:** List the primary individuals that will be involved in the proposed project, a brief bio, as well as a description describing their role and contribution to the successful implementation of the project.

**BOARD OF DIRECTORS:** Include a list of the organization's board of directors with their affiliation, length of time served, and term expiration.

**BOARD PRESIDENT CONTACT INFORMATION:** Please include the name and contact information for your organization's board president.

Supporting Material

Below is a list of required items to be uploaded. Please read the instructions and then scroll to the bottom of the page to enter description(s) of work sample(s) and to upload the required documents.

**ATTACH PROOF OF GOOD STANDING WITH THE IRS:** Visit <https://apps.irs.gov/app/eos/pub78Search.do> and select the search to organizations that “Are eligible to receive tax-deductible charitable contributions.” Please print a PDF of the page that shows your organization listed and upload.

**ATTACH PROOF OF SF CORPORATE ADDRESS:** Attach verifiable proof that the organization has a corporate address in San Francisco. This may be in the form of a telephone bill, electric bill or bank statement. The document should be no more than three months old and must include the applying organization’s name.

**ATTACH A LIST OF YOUR ORGANIZATION’S ARTS ACTIVITIES FOR THREE YEARS:** FY15-16, FY16-17, and the current year ending June 30, 2018. Please note, to be eligible for this grant, you must have held four publically accessible events that span from October 2015 to the grant deadline.

**ATTACH A BALANCE SHEET:** Panelists will be gauging the organization’s financial health by looking at the DataArts Report (which reflects the last three years) and the current balance sheet, which should reflect the organization’s standing as of June 30, 2017.

**ATTACH A DATAARTS SFAC FUNDERS REPORT AND BUDGET NOTES:** Applicants are required to submit an SFAC Funder Report from the DataArts website [culturaldata.org/](http://culturaldata.org/) that includes the three most recently completed fiscal years. If six months have passed since your year closed, it should be entered into your DataArts profile.

Remember to include typed budget notes that correspond with your DataArts SFAC Funders Report.

Panelists will use your DataArts SFAC Funder Report to better understand your organization’s financial position and health.

PLEASE NOTE: For more information about the SFAC Funders Report, please call the DataArts help line at 1-877-707-3282. The staff person on the DataArts help line will walk you through generating this report so that you can upload it to the GMS. The report includes instructions on the cover about the required budget notes.

* Organizations with a reserve or operating surplus should provide notes that explain your reserve policy or plans for use of the surplus.
* Organizations with accumulated deficits must provide notes that detail how the deficit developed and plans for the deficit reduction.
* Organizations that hold outstanding loans or have defaulted on loans must include notes that provide sufficient explanatory details.

**ATTACH WORK SAMPLES:** Please read these instructions before filling out the Work Sample Template and submitting your work samples online. Panelists will review your work samples in advance of the panel meeting to learn about your artistic history, aesthetics, audience, and capacity to implement the proposed project or initiative. We highly recommend limiting your selections to substantive work samples. Samples that fall outside of these instructions will be removed. Panelist will spend no more than ten minutes reviewing all work samples.

**CRSP-P applicant is required to submit:**

* At least one work sample that demonstrates the organization’s artistic history.

**Submit samples that**:

* Demonstrate your skills in the art form(s), manifestation or treatment of ideas. *Press clippings are not appropriate work samples and will be removed.*
* Demonstrate high production quality with clear sound and image. *A good quality audio file of a performer is better than a video of a performer with poor sound quality*.
* Are recent (from the **last three years**).
* Are relevant to the proposed project or initiative. If the most relevant work sample is older than three years, we recommend a balance of newer and most relevant samples.
* Show high quality documentation of an excerpt of a work-in-progress if your proposal hinges on a project or initiative already underway.
* Provide a glimpse of your audience and community, if applicable.

***Do not* submit samples that:**

* Are trailers or montages of performances set to music that reflect more on the skill of your documenter than your own work.
* Direct panelists to look at whole websites without specific instructions indicating content that falls within the limits below.
* Add up to more than six minutes of playback time.
* Are links to sites that require work samples to be downloaded (e.g. Dropbox).

**WORK SAMPLE INSTRUCTIONS**

Please refer to the instructions below for the limits for submission based upon media type. Material and time limits are strict. The template indicates a maximum of **six** work samples. ***Only fill out the template to reflect the number of work samples that you are submitting.***

**Work sample descriptions must include:**

* Title, medium, date of work/activity, dimensions/total duration, brief description to contextualize the work.
* Company/artists involved if the work was done in collaboration with other organizations, presenters, or artists. State your role in the production.
* Explain the sample's relevance to your proposed project if:
	+ the proposed project is a major departure from the style, genre, or discipline presented in your work sample;
	+ the sample document is a work-in-progress; and/ or
	+ the work is with a collaborator or commissioned artist outside of your usual work.

**FORMAT INSTRUCTIONS**
Work samples that cannot be uploaded must be hosted online through your website or a third party platform. **Please be sure to include working links and include passwords if your content is restricted.** If panelists cannot access your work samples this may affect your score.

**AUDIO/VIDEO**

* Audio and video work samples must be hosted online through a third party platform (SoundCloud, Vimeo, YouTube, etc.).
* Provide URLs to the audio or video work samples; include any necessary information on required plug-ins, passwords, or navigation paths.
* Include instructions and time-stamps that cue panelists to the portion you want played.
* Minimum of 480 x 360 video resolution is suggested.
* Show at least two minutes of a work sample so that the panelists can immerse themselves in the content sufficiently to see the arc of movement, grasp a theme or a complete thought being expressed.
* Submit a maximum of four minutes per video or audio files; or two minutes long if combining with another medium.

**IMAGES**

* Must be PDF or JPEG.
	+ You may combine all of your images into one single PDF file or upload each image as a separate file, however if you include more than the allotted images, pages will be deleted to bring the work sample into alignment with our instructions.
	+ Applicants submitting multiple images on a PDF should include relevant information with each image in the PDF
	+ Suggested image size is 800 x 600 pixels.
	+ Maximum size for each image is 5MB.
* Six images maximum; three images if combining with another medium.

**FILM TREATMENTS, LITERARY MANUSCRIPTS, AND PUBLICATIONS**

* Must be PDF.
* ​Include your name and the genre of your sample. Note if this is an excerpt.
* Maximum size for each document is 5MB.
* Ten pages, double spaced maximum; five pages, double spaced if combining with other medium.

**SCRIPTS**

* Must be PDF.
* Maximum size for each document is 5MB.
* 20 pages, double spaced maximum; ten pages, double spaced maximum if combining with another medium.

You may submit a combination of media formats, but are limited to *two*media types.

|  |  |
| --- | --- |
| **You may combine this set of work samples:** | **with one of these additional work samples:** |
| 2-minute audio or video | 5 pages of film treatment, literary manuscript, or publication; or |
| 10 pages of script; or |
| 3 images |
| 3 images | 2 minutes audio or video; or |
| 10 pages of script; or |
| 5 pages of film treatment, literary manuscript, or publication |
| 5 pages of film treatment, literary manuscript, or publication | 2 minutes of audio or video; or |
| 10 pages of script; or |
| 3 images |

**Always test your work samples before submitting.**

### Demographics Survey

Please answer the questions to the best of your ability. Note that **any data you provide will not be seen by panelists or used in the evaluation of your application.** Instead, it will be used to evaluate and inform outreach and technical assistance strategies for SFAC, and also to report out to our communities. We ask demographics for the following:

**RACE/ETHNICITY:**

* **Does your organization primarily serve people of color?** Answer “yes” if more than 50 percent of your artists and/or audience are people of color. And/or your mission statement explicitly mentions communities of color.
* **If you answered “yes” that your organization primarily serves people of color,** **please select which communities of color your organization primarily serves (only select communities that make up 25 percent of your artists/audience served).** If you selected “no”/”decline to state,” you can leave this section blank.
* Please note: We selected these categories based on the largest populations in San Francisco (according to citywide demographic data).

**GENDER:**

* **Does your organization primarily serve women?** Answer “yes” if more than 50 percent of your artists and/or audience are women. And/or if your mission statement explicitly mentions women.
* **Does your organization primarily serve trans or non-binary gender communities?** Answer “yes” if more than 50 percent of your artists and/or audience are trans or gender non-binary. And/or if your mission statement explicitly mentions trans or gender non-binary communities.

**SEXUALITY:**

* **Does your organization primarily serve lesbian, gay, bisexual, queer, or two-spirit communities?** Answer “yes” if more than 50 percent of your artists and/or audience are LGBQ or two-spirit. And/or if your mission statement explicitly mention LGBQ or two-spirit communities.

**IMMIGRANT COMMUNITIES:**

* **Does your organization primarily serve immigrant communities?** Answer “yes” if more than 50 percent of your artists and/or audience are immigrants. And/or if your mission statement explicitly mention immigrant communities.

**DISABILITY:**

* **Does your organization primarily serve the disabled community?** Answer “yes” if more than 50 percent of your artists and/or audience are disabled. And/or if your mission statement explicitly mention the disabled community.

**YOUTH:**

* **Does your organization primarily serve children and youth (0-24 years old) and/or family with children and youth (0-24 years old)?** Answer “yes” if more than 50 percent of your artists and/or audience are 0-24 years old. And/or if your mission statement explicitly mention serving children and/or youth.

**DID REPRESENTATIVES OF YOUR ORGANIZATION ATTEND ANY OF SFAC’S TECHNICAL ASSISTANCE WORKSHOPS?**

* Grants Programs Informational Workshops: Sessions that went more in depth into the content of the applications and grant categories for SFAC.
* One-on-One Sessions with SFAC staff (scheduled in 15 minute intervals).

Certification

This certification and release must be signed by the individual applicant or principal officer of the organization with the knowledge of the matters contained herein and with legal authority to obligate the organization. The undersigned certifies: That all information contained herein is accurate or represents a reasonable estimate of future operations based on data available at the time of application and that there are no misstatements or misrepresentations contained herein or attachment. The individual applicant or organization will comply with the federal laws that regulate Fair Labor, Civil Rights, Accessibility, and other regulations and City requirements in this grant application. The undersigned hereby releases the City & County of San Francisco, the San Francisco Arts Commission, and their respective officers, employees or agents, from any and all liability and/or responsibility concerning damage to or loss of materials submitted to WESTAF, whether or not such damage or loss is caused by the negligence or intentional acts or omissions of WESTAF, its respective officers, employees or agents.

Click Save and Validate.