

# Examples of High Scoring Narrative Questions

## Cultural Equity Initiatives (CEI)

### **IMPORTANT NOTICE:**

*These examples of have been culled together based on the Cultural Equity Initiatives (CEI) grant applications from FY2016-2017. They are intended to help prospective applicants consider how to frame their own grant narrative. Some questions and their respective evaluation criteria may not perfectly align with the changes to application questions we have adopted for the FY2017-2018 grant cycle.*

*Additionally, names have been removed and answers should be read section by section only. For example, Applicant #1 in Alignment with SFAC Goals is not the same as Applicant #1 in Artistic History.*

*Finally, panel comments may seem contradictory, but they reflect the diversity of opinion held by the panelists. While panelists review and score criteria section by section, they also look for consistency in narrative across the entire grant proposal.*

## **Alignment with SFAC Goals**

### QUESTION

- A) What is your organization's mission statement?
- B) Select one or more of SFAC's goals for equitable grantmaking that best align with your organization. SFAC seeks to support organizations that:
- Goal One: Build capacity, resilience and economic viability of individual artists from historically underserved communities.
  - **Goal Two:** Provide a space to access art and creativity for historically underserved communities.
  - **Goal Three:** Promote forms of expression and cultural traditions that are often marginalized.
  - **Goal Four:** Strengthen communities with cross-cultural collaboration.
  - **Goal Five:** Explore intersections of race, gender, sexuality, ability, socioeconomic status, immigration status, religion, etc.

- C) Who does your organization serve and why?
- D) Describe how your organization aligns with the selected goals.
- E) How does your organization meet the needs of the communities you serve (including artists and audience)?
- F) Describe the leadership team and staff's relevant experience and qualifications working in the communities you serve.

## **ANSWERS**

### **APPLICANT #1 ([Organization Name])**

A) Founded in 1997, the [Organization Name] is the world's first and longest-running transgender film festival. We build a strong and diverse community by supporting emerging and established transgender filmmakers, by enabling transgender audiences to see their lives authentically reflected in film, by challenging transphobic representations and the vast under-representation of transpeople in cinema, and by advocating for social justice in media arts.

B) Selected Goal Three

C) [ORGANIZATION NAME] serves the region's 12,000 transgender and 350,000 LGBT residents. Our 2015 Festival audience survey found that transpeople comprised 41% of ticketbuyers and almost all the rest were lesbian, gay, bisexual or queer. Over 50% of our audiences are people of color, and our 2015 audience ranged in age from 15 to 91.

Our programs include a 4-day annual transgender film festival in San Francisco and other co-sponsored transgender film events throughout the year. For the past 10 years, every Festival program has been completely sold to capacity.

[ORGANIZATION NAME]'s programs work to dismantle the mainstream media's historically negative & stereotypical misrepresentations of transpeople that perpetuate and sustain our oppression. Authentic transgender voices and stories are under-represented or entirely absent from mainstream cinema. Transgender characters are typically portrayed as mentally unstable and untrustworthy.

More recently, trans characters have begun to appear in mainstream media, but are often "played" by non-transgender actors – perpetuating the stereotype that transpeople's gender is not "real," and perpetuating the silencing of trans voices and actors. Many mainstream LGBT film festivals continue to tokenize trans films into a single program and do not integrate trans films into their core programs.

Our programs strengthen awareness of trans history, identity, political movements & culture, support trans filmmakers, and provide a forum for dialogue about local & global trans issues.

[ORGANIZATION NAME] prioritizes films by and about our community's most underrepresented segments: transpeople of color, transwomen, immigrants, youth and elders. Our annual international call for entries generates submissions from 100-150 trans filmmakers from around the world.

[ORGANIZATION NAME] supports emerging and established artists, and does not shy away from grassroots, radical, experimental, or DIY films – especially since these are the films often made by our community's most marginalized people.

D) A group of transgender media artists and activists founded the [Organization Name] in 1997 for the same reason so many other marginalized communities have founded film festivals -- the complete absence of our community's voices and leadership in cinema. For the last 19 years, we have presented programs and prioritized films and filmmakers that dismantle the mainstream media's historically negative and stereotypical misrepresentations of transpeople that actively perpetuate and sustain our oppression.

Mainstream cinema/media's transphobic representations compound the staggering societal and economic marginalization transgender people continue to face: a disproportionate percentage of hate crimes and police brutality; fully ONE THIRD of transgender people live in extreme poverty and earn less than \$20,000 per year; 97% have experienced employment discrimination and harassment; 47% have been fired because of being transgender.

[ORGANIZATION NAME] is a grassroots organization based upon anti-oppression principles, and is led by transpeople rooted in diverse communities. [ORGANIZATION NAME] has served as a model for transgender film festivals around the world: our staff has assisted groups in Amsterdam, London, Seattle and Los Angeles to organize Festivals in their respective cities.

Authentic transgender voices and stories are vastly under-represented or absent entirely from mainstream cinema. Rarely, if ever, do transgender characters tell our own stories in our own voices. Since 1997, we have supported and provided opportunities for more than 450 transgender filmmakers - making work about our community in our own voice.

Our 7-member Advisory Board deepens our roots in the region's transgender community, heightens our public profile and builds community support for our programs. The Board meets quarterly and assists [ORGANIZATION NAME] staff to plan our organization's future and to implement its annual fundraising strategy. Both staff members attend all Advisory Board meetings.

E) [ORGANIZATION NAME] addresses the unique and important needs of transgender media artists and audiences, provides a safe and inclusive space for open public dialogue and builds a strong and diverse transgender community.

Since 1997, [ORGANIZATION NAME] has enabled over 450 transgender media artists working in narrative, documentary, animation, experimental, music video and other

formats to reach diverse communities and audiences. Over the past 20 years, the number of local and international transgender filmmakers has grown exponentially because technological developments have significantly reduced the costs of filmmaking. Last year, the [Organization Name] screened work by approximately 45 transgender and gender non-conforming filmmakers. Since our founding, transgender people have made all organizational and programming decisions.

The Artistic Director and members of [ORGANIZATION NAME]'s Screening Committee employ the following criteria to select the films screened at our annual Festival:

- the film must be directed or co-directed by a transgender or gender-non conforming artist;
- the work must authentically explore an aspect of transgender or gender-variant experience;
- the work must challenge transphobia;
- the work must have excellent production values, or if made by an emerging artist, must explore new, compelling subject matter.

Our 10 most recent Festivals have all attracted sold-to-capacity audiences, indicating a large and still-growing demand for our programming. Since our target audience is comprised almost exclusively of the local LGBTQ community, [ORGANIZATION NAME] will develop new messaging and marketing strategies in 2017 and 2018 that will simultaneously expand the number of our annual ticketbuyers beyond 1000 people.

Our international call for entries generates submissions from between 100 and 150 independent transgender filmmakers from 10-15 countries. The City's transgender community supports our work by participating as audience, volunteers, on committees and as donors.

F) [Artistic Director] has served as [ORGANIZATION NAME]'s Artistic Director since 2003. [Artistic Director] is a transwoman and a celebrated pioneer in film, music and transgender rights. She is a longtime Bay Area transgender and LGBT activist. Because of [Artistic Director]'s longtime community organizing work, she has extensive relationships with diverse trans artists, activists, nonprofits and community groups; [ORGANIZATION NAME]'s growth and success is due in part to this community-building work.

[Artistic Director] was active and involved in [ORGANIZATION NAME] since its founding in 1997. She has extensive event-production and curating experience.

[Artistic Director] is a filmmaker whose films have screened at over 50 festivals around the world including The Netherlands, London, Berlin, Barcelona, Rome, Toronto, Vancouver, LA, San Francisco, Philadelphia and New York.

[Artistic Director] was the founding Director of SF Pride's first-ever Transgender Pride Stage, was the first transgender woman on the Board of Directors of SF

Women Against Rape, and the first-ever transgender Grand Marshall of the SF Pride Parade.

Under [Artistic Director]'s leadership, [ORGANIZATION NAME] has been transformed from a small volunteer-based group into a year-round, dynamic organization and a permanent fixture of San Francisco's cultural landscape. In 2010, [Artistic Director] expanded participation in the Festival's curation process by founding a Screening Committee. The Committee is comprised of transgender and gender-non-conforming filmmakers and media activists.

[ORGANIZATION NAME]'s Festival Coordinator Eric Garcia works part-time for both [ORGANIZATION NAME] and Fresh Meat Productions, the nation's largest transgender non-profit arts organization and [ORGANIZATION NAME]'s fiscal sponsor. He has been involved with [ORGANIZATION NAME] for 5 years, and worked in SF's non-profit arts community for the past 8 years.

The Festival's 7-member Advisory Board includes transgender filmmakers, media professionals, transgender rights activists and community organizers. [ORGANIZATION NAME]'s 2017 & 2018 Festivals will each screen an estimated 50 films by trans directors from at 10+ countries.

***Panel Comments: Staff has also gone above and beyond. The target audience is clearly underrepresented: trans people are on the whole not represented in media and art (by themselves). The organization's intentionality is very evident. They have a clear connection to community and sustained, consistently sold-out programming; leadership is qualified and has been working within the community. Applicant demonstrates thorough understanding of communities being served by providing demographics of community. Applicant also has genuine intention as founders of organization are from the very community being served. Applicant is in strong alignment with SFAC Goal 3. Applicant provides a solid and sound strategy for meeting the needs of the community as they are a model for other film festivals that serve a similar community around the world. Leadership reflects the background of the community served and possesses relevant experience and knowledge.***

## APPLICANT #2

A) [Organization Name]'s ensemble produces poetic, bold theater created by new and contemporary artists. We seek to engage our community by producing adventurous work, innovative in structure, which addresses the diverse political and social concerns of our audiences.

B) Selected Goal One

C) [Organization Name] Theater Company is a leader in the development of a diverse and inclusive canon of new plays in a field that is struggling to reflect the rich

multiplicity of experiences within our Bay Area communities. We believe that theater has the power to unsettle our complacency around simplistic and problematic cultural norms established and held by our white-led society. At its best, theater reveals truths that past ideologies do no account for in our vibrant differences. Shepherding different communities together under one roof, and exposing them to alternative perspectives is a powerful antidote to the overly simplified and often divisive rhetoric of our times. Theater can offer a unique opportunity (for artist and audience) to engage in a combination of self interrogation, active listening, and deep conversation that leads to empathy, and a shift in societal power structures.

The artistic voices we support are at the forefront of this counter-cultural inquiry. Since 2009, 100% of the plays that we have produced or developed were written by women, people of color, or queer-identifying playwrights. To capture the truth of their narratives, we practice color-conscious casting and intentionally hire women and people of color to lead our creative teams. Our current season's mainstage reflects 73% actors of color; 100% playwrights of color, and 75% directors of color. 75% of our directors this year are also female. We purposefully serve artists who are under-represented or invisible in mainstream theater and media. In championing their perspectives it has undeniably followed that [Organization Name]'s audience reflects the diversity of our artists and the narratives we tell on our stages in terms of ethnicity, culture, age, and taste. Our audience demographic is: 55% female; 43% people of color; with over 50% under the age of 40. We maintain low-cost ticketing options allowing access for the majority of our audience whose income falls under 40K a year.

D) In the SF theater ecosystem we serve as a vital artistic home for over 100 diverse artists annually who hunger for new avenues of artistic expression. As a company helmed by three women, and led by one of the few female Artistic Directors of color in the country, we promote an environment in which all voices are valued equally.

We honor the individual's path towards creative growth, investing deeply in an artist. For example, an emerging director first worked with us as an assistant. Her next project was a co-directorship with the Artistic Director as her partner. This African American woman expressed how we are one of the few companies to offer her an in-depth female-led mentorship, supporting a comprehensive professional growth plan. Through this plan, she expanded her directing knowledge and achieved more confidence in her own artistic voice. She is now slated to solo-direct in our Matchbox New Play Development Series, and as a new Resident Artist, she will have continued access to the counsel of fellow company members as she navigates the larger field—and the political intricacies of inequity within it.

Many of our playwrights forged their first productions with us and are now recognized nationally as significant voices in a new generation of American theater. Local playwright Lauren Gunderson, whose first Bay Area production was presented by [Organization Name], is now America's most produced living playwright; and Christopher Chen, currently working on his third commission with us, is an award-winning Bay Area playwright garnering accolades across the country.

The above anecdotes are three examples of the many artists we serve. Our deep commitment to artistic growth and to approaching all with respect and inclusion is reported as a rarity in our field. This environment encourages courage of spirit, expansion of vision, and it is what allows us to boldly explore narratives that disrupt and complicate comfortable notions of cultural hierarchy.

E) [Organization Name] champions artistic voices outside the predominantly white-framed, traditionally male-dominated narrative in our field. It is our culture of inclusivity, along with commitment of resources, that encourages our artists to create innovative counter-narratives seeking to make visible societal ills and experiences which may be invisible in mainstream culture.

This is done by producing a season of three shows along with new-play development programming through The Matchbox which includes commissions, workshops, and an annual, free public reading series. All public presentations and productions include deep discourse with our audience, made up of diverse and engaged members, in response to the art. We serve approximately 2,500 audience members annually.

Under our current strategic plan, we have taken further steps to support the growth of and increase the plurality of artists in the Bay Area by: 1) codifying an individually customized mentorship program for emerging directors dramaturgs, designers, and technicians, and 2) expanding The Matchbox to include a year-long lab component for playwrights and directors.

Both programs were conceived from a series of one-on-one interviews and focus groups with artists who identified a void of customized support aimed at creating new, exceptional forms of theater, and both will privilege women, queer identifying, and/or voices of color. Artists from these underserved groups report a deeper level of scrutiny as compared to the work of their white colleagues. In order to ensure artistic success and future growth opportunities for these artists, it is imperative to create space that values their specific voice, perspective, and experience by providing time and resources for trial and error.

We will also continue to award our Ignite Grant, established and funded by an individual donor to enhance the working lives of individual designers and technicians through micro-grants for professional development/resources.

F) [Organization Name] is honored to be a part of Theatre Communications Group's national cohort of over 20 theaters tasked with transforming the national theater field into a more equitable, inclusive, and diverse community. Our leadership, consisting of Managing Director [Name] and Artistic Director [Name], has exemplified a commitment to upholding a plurality of perspectives, fostering heretofore unheard voices, and encouraging artistic excellence and innovation at [Organization Name].

[Artistic Director] is currently a prominent figure in the BEYOND ORIENTALISM national initiative to lift up Asian Pacific Islander voices. During the closing plenary of the 2015 Theatre Communications Group Conference, [Artistic Director] spoke about

artistic leadership in our age of diversity, and her belief in creating safe spaces where artists can explore new approaches based on sound principles. She is one of the 2016 Yerba Buena Center for the Arts YBCA100, recognized for "asking questions and making provocations that will shape the future of culture." Prior [sic] to joining [Organization Name], [Artistic Director] played a significant leadership role in the creation and founding of Berkeley Rep's new works development program "The Ground Floor." [Managing Director] has a background in engaging traditionally underserved communities via the arts at TheatreWorks. As their Associate Director of Education and Outreach she focused on education and engagement programs in East Palo Alto and East Menlo Park.

Vision and passion without the ability to fund initiatives serves no one, especially traditionally under-resourced artists and communities. As Managing Director of [Organization Name], [Name] has overseen the hiring of two Artistic Directors, increased the organization's budget from \$50K in 2009 to \$250K in 2016, doubled the audience, and developed infrastructure to hire union actors. As Board President for Shotgun Players, [Artistic Director] was instrumental in building the Board and growing the organization from \$700K to \$1.2 Million.

*Panel Comments: [Organization Name] Theater Company strongly aligns with Goal One, to build capacity, resilience and economic viability of individual artists from historically underserved communities. They could have fit easily into Goal 5 as well. They are led by one of the few female Artistic Directors of color in the country, and are part of a cohort of over 20 theaters tasked with transforming the national theater field into a more equitable, inclusive and diverse community. Leadership shows both artistic and administrative talents. [Organization Name] is very clear about whom it serves: artists of color, women and queer-identifying artists. Audience demographics reveal that over 40% are people of color, so there is clear connection between artists served and audiences served, with a significant number of audience members earning under \$40K a year. From its inception, [Organization Name] has built its community from a clear sense of purpose, and the current leadership, which came in at different times, share the values that grow this purpose in strategic and bold ways. The Artistic Director is a proven leader in the American theater, focusing not only issues of representation of Asian and Asian Americans in theater, but also as a leader in equity, diversity and inclusion. The Managing Director has grown the budget significantly and in her partnership with the Artistic Director has continued a dramatic growth in the support and audience base for the organization. They very much serve several underrepresented populations (women, queer, people of color, etc.) with intentionality; they have clear alignment with SFAC goals. The organization has a clear commitment to underrepresented stories and people in theater and they have internal mechanisms (mentorship, new play development, programming, etc.) in place to make sure they sustainably support artists and their burgeoning craft and/or premiering plays. Leadership is very qualified to engage in this work. They are moving towards much greater focus on cultural equity and alignment with SFAC goals. I feel that the SFAC investment will*



*ensure and deepen [Organization Name]’s place as an artistic incubator and platform for underserved voices; artistic voices they support at the “forefront of countercultural inquiry.”*

## Artistic History

### QUESTION

Describe your organizational history and highlight major accomplishments that are relevant to the proposed project.

### ANSWERS

#### APPLICANT #1

[Name], Founder & CEO of [ORGANIZATION NAME] and a dedicated team have built an unique hybrid nonprofit social enterprise that has been providing a solution to the lack of diversity in media. We provide nonprofits and community benefits partners the ability to tell stories that make a positive social impact in their community while also providing a pathway from education to employment in the creative, tech and media industries for those most historically underrepresented or misrepresented in media.

After 12 years, [ORGANIZATION NAME] has educated over 3,500 students, employed over 150 students, and our most recent intern graduates are being employed by: Lucasfilm, HBO, Netflix, Autodesk, and Wired. In addition to [ORGANIZATION NAME]’s award-winning youth media appearing in over 35 film festivals, [ORGANIZATION NAME]’s work has had international, national and local impact for clients such as Super Bowl 50, Yahoo!, Bank of the West, Union Bank, Citibank, Golden State Warriors, SF Foundation, Japan Society, National Park Service, United Way Bay Area, and the SF Public Utilities Commission.

Examining What Works:

We’ve created a pathway for low-income youth to discover their talent, passion and stories, building artistic and technological skills and confidence while they are in middle school and high school through our after-school programs, summer intensives and in-school workshops. As a result, 100% of our youth of color who have taken more than two [ORGANIZATION NAME] classes return to school the following year.

Just as Academy experiences are usually the first outlets for creative and artistic expression for [ORGANIZATION NAME] youth, [ORGANIZATION NAME] Studio is the first employer for many low-income young adults. In just the last two years, 80%

of intern graduates were placed in creative, media-related jobs, and 78% placed are young creatives-of-color and 55% are young women.

The first year that Studio launched, it accounted for 10% of our annual income. Today, it's 50%. The paid work of [ORGANIZATION NAME] Studio provided us the opportunity to partner as co-educators, co-creators and the storytellers and designers who support the multi-faceted Bay Area arts ecosystem, with cohorts including: ACT, Yerba Buena Center for the Arts: Youth Artists at Work, Los Cenizontles, Loco Bloco, Performing Arts Workshop, Brava! For Women in the Arts, Chinese Culture Foundation of SF, Precita Eyes Muralists, Z Space Studio and Zaccho Dance Theatre.

#### Examining The Need:

Last year [ORGANIZATION NAME] received over 300 applications for 100 spots, putting us in the difficult position of turning away over 200 applications. [ORGANIZATION NAME] Studio served over 75 nonprofits last year, but also saw an increased demand at least a 15% increase from arts nonprofits and cbo's who support our arts ecosystem needing a greater digital presence. Similarly, the appetite for corporate community benefits partners to support the storytelling needs of their grantees presented itself with our largest corporate Studio project, creating 50 videos in 50 weeks for 50 nonprofits for Super Bowl 50.

Most recently, [Director Name] was the recipient of the Jefferson Award and selected to be a TED speaker. Yet in spite of our achievements, we are increasingly more aware of the financial struggles our students and interns face as well as the demands for our services. That is why we must build capacity and engage in strategic planning to determine how to move forward serving the most people with the greatest need, while building our hybrid business model to serve more nonprofits and community benefits partners.

***Panel Comments: They have a high number of work samples - too much to see! - but all are very impressive. It's great to see work authentically representing youth voices. They have a robust artistic ascent over the years. Their programming has been consistent and robust also. They have very high quality work samples that are solidly in line with their mission. This is an excellent organization that has proven itself over the years based on extraordinary leadership and clarity of purpose. The work samples prove that quality is central to every aspect of their social justice purpose. Applicant demonstrates very strong artistic accomplishments. Organization's activities demonstrate a consistent history of relevant programming. Applicant's work samples reflect a high level of skill, artistry and connection to organization's mission.***

## APPLICANT #2

Founded in 2001, [ORGANIZATION NAME] has long-standing collaborative relationships with many Bay Area artists and organizations. From 2005-2008, we

were artists-in-residence at ODC Theater. In 2006, *Dance Magazine* named [ORGANIZATION NAME] as “One of 25 to Watch.” In 2007, we created the performance environment for *The Revenge of Huitlacoche* in collaboration with the Eastside Arts Alliance, an organization of visual artists and community organizers of color in East Oakland. That same year, [ORGANIZATION NAME] presented our work at the Hemispheric Institute on Performance and Politics’ Encuentro in Buenos Aires, Argentina.

In 2008, we were chosen to be the San Francisco representative for SCUBA Touring Network, and toured excerpts of *Huitlacoche* to Minneapolis, Philadelphia, and Seattle. In 2010-11 we were Irvine Fellows at the Lucas Artist Residency Program at Montalvo Arts Center. In 2011, Yerba Buena Center for the Arts presented the premiere of *Atlacualo: The Ceasing of Water*.

[ORGANIZATION NAME] has also been presented by Ohlone College, Cal State East Bay, California College of the Arts, 509 Cultural Center, Dancers Group ONSITE program, Tenderloin Museum, FRESH Festival, the Asian Pacific Islander Cultural Center, the National Queer Arts Festival, the Oakland Museum of California, the San Francisco Asian Art Museum and other notable festivals, institutions, and venues.

Our 2014 – present work, *The Anastasio Project*, is an ongoing, community-based project that requires relationship-building and local engagement in each geographic site it travels to; we are currently developing the project in San Francisco and in San Diego near the US-Mexico border. The project is supported by grants from the MAP Fund, the Center for Cultural Innovation, the City of Oakland Cultural Funding Program, California Arts Council as well as the Kenneth Rainin, Open Circle and East Bay Community Foundations.

Our most recent work, *RACE*, deepened [ORGANIZATION NAME]’s relationship to the residents of the Tenderloin as well as the robust network of artists, non-profits, and advocates who have long worked to support this community. The project created an continuing relationship with the 509 Cultural Center and Anne Bluethenthal’s Skywatchers program which engages residents of Tenderloin SROs in dance and storytelling. *RACE* was supported by Dancers’ Group’s ONSITE commissioning program, SFAC Organizational Project Grant, California Arts Council Zellerbach Family Foundation, CA\$H Grant, and Kenneth Rainin Foundation.

To date, co-directors [Name] and [Name] have served as the organization’s leadership, overseeing all artistic, financial, and administrative aspects of [ORGANIZATION NAME] with occasional support from part-time contractors, our fiscal sponsor, artist friends and Advisory Board members. [ORGANIZATION NAME] has been enormously successful raising project-related grant funding; the co-directors and Advisory Board members agree that increased capacity-building funds will bolster the organization’s future.

***Panel Comments: They are highly prolific; I appreciate that they re-present and revise works so that they get the maximum utility out of them and ensure they reach wide audiences; they also leverage them for partnerships. Their***

*organization history and accomplishments are described clearly; clear ascent in offerings and artistic production. Their work samples are very helpful; I see that they still demand a high level of artistry, and make it particularly accessible for people who don't identify as artists. [ORGANIZATION NAME] does beautiful work that stems from a "with community" ethos, not just a "for community" ethos. RACE and Anastasio Project stand out as well as their in-depth racial justice work with youth in the Bayview/Hunter's Point neighborhoods. Work samples reflect aesthetic and purpose. Applicant demonstrates very strong artistic accomplishments during their existence. Calendar of activities demonstrates a consistent history of relevant programming. Applicant's work samples reflect a high level of talent, skill, artistry and connection to organization's mission.*

## Quality of Proposed Project

### QUESTIONS

A) Describe the current state of your organization, including any opportunities, challenges, and major changes.

B) Have you completed a Strategic or Business Plan?

If NO, this grant MUST be used for strategic or business planning. Describe the ways that your organization (staff, board, volunteers, infrastructure) is prepared to begin strategic or business planning processes?

If YES, explain how the proposed project aligns with the main goals and strategies identified in your plan. Please cite the relevant section of your strategic or business plan for the panel to review. You will be prompted to attach a copy of your strategic business plan in the Supporting Materials section.

C) This question is for **ALL** applicants. Describe the proposed capacity-building or planning initiative and the ways it will ensure the artistic and cultural vitality of the organization. Note: For organizations that have not gone a strategic or business planning process this grant MUST be used for that purpose.

D) How will this initiative impact the sustainability (financial, human resources, programming, etc) of your organization? Include how the gains from this initiative will be sustained after the term of the grant. This question is for **ALL** applicants.

E) This question is for **ALL** applicants. Describe your desired outcomes and strategy for evaluating the impact and success of the initiative.

F) Grant Plan Template

## **ANSWERS**

### **APPLICANT #1**

A) In FY 2015-16, [Organization Name] made major organizational advances: we enhanced our exhibitions' artistic quality and nearly doubled the program's operating budget. In addition to a SF Arts Commission grant, [Organization Name] secured our first California Arts Council grant, which made it possible to adequately finance the program's staffing and operations expenses.

To date, [Organization Name] has conducted five cycles of the Queer Ancestors Project and is currently conducting the sixth. [Organization Name] has now arrived at an organizational crossroads: while we have developed and implemented innovative programs that address community needs, we have not yet confronted the organization's need for consistent fundraising, a computerized financial management system and a roadmap into the future.

Over the course of the two-year initiative, we will expand our Advisory Board to 7 members to heighten [Organization Name]' public visibility. We anticipate that our Advisory Board will be the source of the individuals who eventually decide to incorporate [Organization Name] as an independent 501©3 organization, perhaps during FY17-18.

B) No. During 2016-17 [Director] will prepare the organization to participate in a strategic planning process and will begin activating our Advisory Board. During the grant period, she will expand her time commitment and will lay the foundation for a staff infrastructure with the capacity to support [Organization Name]' eventual evolution into a professionally managed non-profit arts organization. To develop [Organization Name]' first strategic plan and to move the organization in the direction of financial sustainability, the Director will contract with Miriam Abrams, one of the Bay Area's best-known strategic planning consultants. To develop and implement the financial management system, [Organization Name] will contract with LaVette Virden. The [Organization Name]'s Development staff will assist [Organization Name] to design and implement an ongoing fundraising strategy to support the organization's growth and evolution.

C) During the 2-year grant period, the Director will organize two 16-week cycles of the Queer Ancestors Project, conduct 50 tuition-based printmaking classes, strengthen [Organization Name]' fundraising and financial management capacities, and prepare a Queer Ancestors Project manuscript, which will make our work known to a much broader audience.

By expanding [Director's] time commitment, the initiative will enable her to participate in a professionally facilitated strategic planning process that will accelerate [Organization Name]' evolution into a professionally managed and sustainable non-profit arts organization. The strategic plan will outline the specific

programmatic, organizational fundraising, marketing and governance activities that [Organization Name] will undertake from July 2018 to June 2020.

In 17-18, the Director will ensure the vitality of [Organization Name]' artistic programs by strengthening our exhibitions' production values and preparing a manuscript documenting work created by participants in the QAP's first 9 program cycles. In 18-19, the Director will engage the Artistic Advisory Board in discussions about the programmatic, community engagement, fundraising and financial management activities prioritized in the strategic plan's first-year.

D) The initiative's implementation will advance [Organization Name] towards financial sustainability. Since 2011, [Director] has strengthened her fundraising skills by participating in the [Organization Name]'s Arts services program. In July 2017, [ORGANIZATION NAME]'s Development Department will assist her to design a two-year fundraising strategy and to revise it monthly to take new funding opportunities into account.

[ORGANIZATION NAME] will identify the funders most likely to support [Organization Name]' programs and assist [Director] to develop compelling proposals that directly address their priorities. In July 2018, [Director] will contract with Financial Management Consultant Lavette Virden, who will design a computerized financial management system that aligns [Organization Name]' chart of accounts with the categories employed by DataArts. Once established, the consultant will assist [Director] to identify and train a bookkeeper to oversee the system.

After the grant period, [Organization Name] will sustain the Director and Bookkeeper's positions by including them in the annual operating budgets. A proposal is currently pending with Southern Exposure's *Underexposed* grant program; in 2017-18 we anticipate receiving an additional grant from CAC's Artists Activating Community program.

E) Our staff and Advisory Board will annually assess the quality of our printmaking classes and exhibitions, their impact on the participants and the community, and the success of our fundraising efforts. They will also assess our proposed manuscript and our participants and audiences' diversity.

[Organization Name] will consider the grant period successful if by June 30, 2019 we have:

- developed and implemented a strategic plan;
- established a computerized financial management system;
- hired a bookkeeper;
- expanded our Advisory Board to 7 members;
- conducted 2 cycles of the Queer Ancestors Project;
- installed 2 curated exhibitions at the LGBT Community Center;
- completed and submitted for publication a manuscript documenting the creative work and artistic statements of QAP artists;

--generated annual tuition payments of \$27,000 and operating budgets exceeding \$50,000;

--attracted at least 350 people to each exhibition.

F) Grant Plan Template

Activity	Outputs	Complete by
Strategic planning	Contract with planning consultant Complete strategic plan Implementation- year one	July 2017 June 30 2018 June 30 2019
Financial Management	Contract with Financial Management Consultant Align income and expense categories with those employed by Data Arts. Hire and train bookkeeper	July 2018 September 2018 January 2019
Fundraising	FY 17-18 plan completed FY 18-19 strategy designed Strategy implemented	July 2017 (monthly revisions begin) July 2018 June 2019
Community Engagement	Expand Advisory Board to 7 members	June 2019
Manuscript	First draft completed Second draft: edit and design Submit for Publication	January 2018 May 2018 June 2019
Personnel	Hire Strategic Planning Consultant Hire Financial Management Consultant Hire and Train Bookkeeper	July 2017 July 2018 January 2019

*Panel Comments: Evaluation outcomes could be clearer. No strategic plan but they seem clear on their trajectory. Initiative is well-planned; very achievable. They have logical, timely markers of success; very much in line with what they're doing. Applicant demonstrates a high level of awareness and clarity regarding current state of organization as it relates to proposed initiative; major changes are that organization will expand advisory board to seven members to heighten organization's visibility. Applicant's proposed initiative is clear, logical, reasonable and relevant, having great potential to foster artistic vitality and financial sustainability beyond the term of SFAC grant funding; proposed initiative strongly aligns with the organization's direction. Organization is preparing to participate in strategic plan process. Applicant's stated desired outcomes and strategy to evaluate the impact and success of the proposed initiative are clear and appropriate. Recommendation: articulate a more detailed evaluation component (timeline; milestones attained; method of evaluation; types of assessment instruments/tools used) that will measure quantitatively, as well as qualitatively, the impact and success of the proposed initiative.*

## APPLICANT #2

A) In 2015, [ORGANIZATION NAME]'s Board adopted a strategic plan to address our major challenge: how to replace the Artistic and Development Directors (who will



retire within a year) while maintaining our programs' artistic quality, a \$600,000+ operating budget and a \$50,000+ cash reserve.

Because [Artistic Director] and [Managing Director] make most of [ORGANIZATION NAME]'s organization, artistic and financial decisions, the strategic plan allocated funding to enable them to provide hands-on training to their successors during 2016-17.

For 20 years, Artistic Director [Name] has provided artistic and financial support to hundreds of queer artists and emerging arts organizations. She has served as the annual June NQAF Executive Producer and Curator and leads the selection of the CQC commissioned artists. Development Director [Name] formulates and implements [ORGANIZATION NAME]'s annual fundraising plan and prepares and submits funding requests to foundations and government agencies. He is also [ORGANIZATION NAME]'s Financial Manager: he develops the annual operating budget, revises it monthly and oversees [ORGANIZATION NAME]'s financial management and reporting activities. While his successor will take on all development related duties, [ORGANIZATION NAME] will hire a different person to perform [ORGANIZATION NAME]'s financial management duties.

B) Yes. Because 2 of [ORGANIZATION NAME]'s 3 founders announced their retirement dates two years in advance, [ORGANIZATION NAME] had the opportunity to conduct a year-long strategic planning process to decide how to proceed. Specifically, the process explored 4 central issues: the process and timeframe to identify and train new staff leadership; how to clarify decision-making and accountability in an organization that operates virtually; how to strengthen the board of directors' roles; how to integrate social justice and cultural equity into everything [ORGANIZATION NAME] does.

The process concluded in November 2015 with Board/staff consensus: during 16-17, [Artistic Director] and [Managing Director] will train their replacements by engaging them in [ORGANIZATION NAME]'s day-to-day artistic and fundraising decision-making. This hands-on mentorship approach will strengthen the capacities of the new decision-makers who will lead [ORGANIZATION NAME] during this transitional period.

The initiative will provide general operating support that will enable [ORGANIZATION NAME] to address the challenges confronting the organization at this pivotal moment in our history: it will continue to strengthen the new staff's artistic planning and fundraising capacities and enhance [ORGANIZATION NAME]'s capitalization by expanding our cash reserve from \$30,000 to \$50,000.

C) The initiative will ensure [ORGANIZATION NAME]'s artistic and cultural vitality by providing the new Artistic Director access to outside specialists who will sharpen her curatorial skills and deepen her roots in the City's queer community. [Artistic Director] has chosen [Name] as her successor: Webb first worked with [ORGANIZATION NAME] in 2008 when she managed our box office and has performed in 7 NQAFs.



SFAC funding will enable Webb to attend at least six major national and statewide conferences over the next two years where she will interact with her peers: the annual Association of Performing Arts Presenters (APAP), the annual National Performance Network (NPN) and Visual Artists Network (VAN), the annual California Presenters and the CA Arts Council's annual Sacramento gathering.

In addition to familiarizing herself with the national and statewide presenting field, [New Director] will have the funds available to contract with specialists who will assist her to solve specific problems. For example, [ORGANIZATION NAME] will contract with Strategic Planning Consultant Miriam Abrams to continue working with [ORGANIZATION NAME] staff to define the organization's long-term artistic and financial direction.

D) During the 2-year grant period, the new Development Director [Name] will formulate and implement an annual grantwriting strategy that will identify the funding sources most likely to support [ORGANIZATION NAME] and our 9 fiscally sponsored organizations. She will revise the strategy on a monthly basis to take new funding opportunities into account.

CEI funding will support the expansion of [ORGANIZATION NAME]'s Development Department in order to provide affordable Grantwriting assistance to the 9 organizations currently participating in [ORGANIZATION NAME]'s arts services program. The initiative will also promote [ORGANIZATION NAME]'s long-term financial sustainability by expanding our current \$30,000 cash reserve to \$50,000 by the grant period's conclusion. CEI funding will also enable the new Artistic and Development Directors to contract with outside specialists to resolve problems they encounter during their first two years.

[ORGANIZATION NAME] will sustain the financial gains made through the proposed initiative by including the costs of the expanded Development Department in our annual operating budgets. CEI funds will also enable [ORGANIZATION NAME] to hire and train a Financial Manager in July 2017; at present, the current Development Director serves as [ORGANIZATION NAME]'s Financial Manager.

E) As the center of international queer art and culture, it is essential that the City of San Francisco nurture the growth and evolution of non-profit arts groups committed to serving the needs of Queer artists and audiences. Anticipating the retirement of two of its three founding directors, [ORGANIZATION NAME]'s strategic plan outlined the process to recruit, identify, hire, and train new organizational leadership. Contracting with additional Development staff will enable [ORGANIZATION NAME] to maintain the levels of artistic and financial sustainability that has driven the organization forward over the past two decades. Our measurable outcomes will include:

- By fall 2017, a new Artistic Director, Development Director and Financial Manager will be in place and trained.
- Online tools will support better staff communication within and across programs.

- [ORGANIZATION NAME]'s cash reserve will expand from \$30,000 to \$50,000.
- The Board will finalize a statement outlining member responsibilities, adopt a “give/get” contributions policy, establish new committees, and increase its participation in and understanding of [ORGANIZATION NAME]'s finances.
- A greater sense of teamwork will exist between staff and board and among the staff.

#### F) Grant Plan Template

Activity	Outputs	Complete by
Implement succession plan	Replace 2 of the 3 founders	10-31-2017
Expand staff infrastructure	Hire additional Development Department staff Hire Financial Manager	7-1-17
12 month Grantwriting strategy designed, implemented and revised monthly	Increase government and foundation funding for QCC'S 9 fiscally sponsored organizations	6-30-19
Increase QCC's capitalization	Expand cash reserve from \$30,000 to \$50,000	6-30-18
Evaluate Initiative	Evaluation Report submitted to SFAC	6-30-2019

*Panel Comments: Organization has completed a strategic plan and is proactively preparing for a critical shift in leadership as well as assuring stability in the transition. They're preparing for shift in leadership, which is logical, reasonable and relevant. Applicant is aware of opportunities, challenges and changes that initiative will have on organization's current operations, especially since they are preparing succession two years in advance. Applicant's proposal is sound and aligns with the organization's current strategic plan related to leadership transition and organizational stability. Applicant provides concisely five desired outcomes. Area for improvement: Applicant has not clearly articulated method(s) of evaluation/measurement to demonstrate achievement of these outcomes. They have completed Strategic Planning and are aware of the opportunities and needs in a community of artists that make up nearly 10% of our population but receive around 2% in civic funding. [ORGANIZATION NAME] has positioned itself financially and structurally to lead its way through a thoughtful leadership succession plan. Building the company's reserve up to \$30,000 after moving to a \$600,000 budget seems ambitious and reachable. I also think its commitment to increasing grant-writing services to the arts organizations and artists they serve is solid, on mission and in keeping with SFAC CEI goals. The detail of the transition plan focusing on mentoring new leadership is very sound thinking and practice. I question the apparent foreshortened process of identifying a new leader (which from the narrative came from the current leader and no language around community input or other process). Clearly articulated and sound financial and artistic outcomes. The strategic plan looks very clear and work they've done to replace the two main founder/leaders seems to be on schedule. The succession, outcomes and schedule/planning seems very straightforward and in line with the strategic plan. There's a great (realistic) timeline of proposed activities for grant plan. Evaluation benchmarks are clear. I'm not sure how to*

*evaluate progress toward “a greater sense of teamwork” though that seems important, since there wasn’t discussion of how efficient teamwork feel is now, so that is slightly concerning. It would be great for there to be more midterm benchmarks given the vastness of these transitions and their roles to the organization. There are questions about what the SFAC grant would add other than general support.*