



TRANSFORMING LIVES
THROUGH *the* ARTS

2020 Arts General Operating Grant Program

Grant Guidelines

TACA (The Arts Community Alliance)
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OVERVIEW OF TACA & ARTS GENERAL OPERATING GRANT PROGRAM

Since its founding in 1967, TACA - The Arts Community Alliance - has worked to establish North Texas' arts community as one of the strongest in the nation. TACA blends financial backing through competitive grants and capacity-building activities, like professional development workshops, to support and strengthen arts organizations. Our growing investment in the arts translates to new premieres and productions, impactful residencies and community initiatives, and more opportunities for artists and audiences to connect – all making Dallas a vibrant city and a great place to live and work.

TACA is unique in its business model in that it relies on the generous support of individuals, corporations, and foundations to support its mission. TACA is not a foundation and does not have an endowment. Therefore, TACA's available funding can fluctuate from cycle to cycle.

TACA's mission is to support excellence and impact in the arts through grant-making, capacity building, and thought leadership. We envision an innovative, inclusive, sustainable cultural sector, recognized for its essential contribution to a vibrant, prosperous community.

The Arts General Operating Grant Program is TACA's largest granting program, providing unrestricted financial support to local arts organizations. Specifically, the program is designed to:

- foster artistic excellence
- encourage innovation and originality
- support and inspire local artists and local creation
- increase accessibility to the arts for all citizens of Dallas County
- reward financial and administrative stewardship

BASIC ELIGIBILITY REQUIREMENTS

In order to be eligible to apply for funding, an organization must:

- be a performing or visual arts organization
- have received its IRS 501(c)(3) designation as a public charity by March 1, 2018, and such designation must remain current with the IRS
- be able to submit clear financial reports to document its revenues and expenses for at least one full year prior to the application deadline
- be deemed by TACA as eligible to apply after completion of the Pre-Application Process
- provide year-round performing and/or visual art programming for a live, public audience
- satisfy one or both of the following requirements:
 - a. A majority of the organization's public arts programming (including free or low-cost educational programming) must take place within Dallas County*; OR
 - b. A majority of the organization's patrons (including youth/students) are residents of Dallas County

*Does not include touring outside of North Texas.

INELIGIBILITY:

TACA does not provide funding to the following institutions:

- Colleges/Universities/High Schools/Elementary schools
- Fiscally-sponsored organizations
- For-profit arts organizations
- Non-arts organizations with arts programming

FUNDING RESTRICTIONS:

TACA grant awards may not be used to fund the following:

- Capital improvements, endowments, construction or real property
- Debt retirement, deficiencies in previously completed projects
- Cash prizes
- Benefits and events planned primarily for fundraising purposes
- Interest on loans, fines, penalties or costs of litigation
- Conservation and preservation
- Workshops, lectures, etc.
- Catalogs
- Re-granting initiatives
- Research
- Arts writing (publications)
- Acquisitions
- Festivals and fairs
- Competitions

PRE-APPLICATION PROCESS

LETTER OF INTEREST (LOI):

Every organization interested in applying for an Arts General Operating Grant is required to submit a digital Letter of Interest (LOI) by March 1, 2019 at 5:00 p.m. (CST). The digital LOI can be accessed by visiting the TACA website at <https://taca-arts.org>. Before you can access the LOI, you will need to create an account in the TACA Grants Portal with your own username and password (if you have not already done so in a prior year's application).

The digital LOI consists of the following elements:

- Basic organizational information (e.g. mission, vision, history, contact information)
- Copy of IRS Determination Letter
- Public arts programming schedule for calendar-year 2019
- Board of Directors/Trustees listing
- Financial summary (see below for more information)

FINANCIAL SUMMARY:

As part of the digital LOI, every organization is required to submit a financial summary consisting of audited financial statements (if your organization is audited) for your most recently completed fiscal year AND your most recent IRS Form 990¹. If a current audit is not available, organizations must submit unaudited finalized financial statements (income statement and balance sheet) for your most recently completed fiscal year, and your most recent IRS Form 990¹. When deemed necessary, an organization may be asked to supply additional information.

Financial Reviewers designated for each grant panel will conduct a review of submitted financial statements. The purpose of this review is to determine whether an applicant organization meets TACA-determined minimum requirements for Financial/Administrative Stewardship & Capacity.

Applicants are highly encouraged to provide audited financials and to submit updated financials throughout the grants process as they become available.

¹ If you are not required by the IRS to file a Form 990, please submit your e-postcard/Form 990-N.

DEBUT INTERVIEW PROCESS FOR NEW APPLICANT ORGANIZATIONS:

New applicant organizations – organizations that have not applied for a TACA grant in the past three years – must go through the Debut Interview Process. The purpose of this process is to provide an opportunity for newly applying organizations to seek clarifications about our grant process and improve our understanding of the programming, artistic excellence, operations and financial health of the newly applying organization.

After submitting an LOI, a TACA staff member will contact your organization to arrange a meeting to discuss the items stated above.

CURRENT 2019 GRANT RECIPIENT ORGANIZATIONS:

As part of the Pre-Application Process, the TACA Grants Committee reserves the right to meet with current TACA 2019 Grant Recipients that are re-applying for funding if there are any questions/concerns about their eligibility and/or financial and administrative stability.

GRANT CATEGORIES:

The Arts General Operating Grant Program has two grant categories with their own respective evaluative criteria:

General Arts	Provides general operating support for performing and visual arts organizations.
Youth Performing Arts	Provides general operating support for youth performing arts organizations.

- The term “youth” requires the majority of the performers/artists to be ages eighteen or under

Important: An organization can only apply in only one grant category in any given cycle.

GRANT PANELS:

Applicant organizations are organized into panels based on artistic discipline (for example, a theater/musical theater panel or visual arts panel). The TACA Grants Committee determines the makeup of panels after each Letter of Interest (LOI) is received. Youth Performing Arts organizations are evaluated collectively with separate evaluative criteria.

ELIGIBILITY REVIEW & NOTIFICATION:

LOIs are reviewed by TACA staff and the TACA Grants Committee to determine if the applicant organization meets all of the eligibility criteria. Based upon the Pre-Application Process (and Debut Interview Process for newly applying organizations), all organizations who submitted an LOI will be notified of their eligibility to apply for an Arts General Operating Grant by **July 15, 2019**. Eligible organizations will subsequently be given access to the full application.

FULL APPLICATION PROCESS

The full application will be available to access in the TACA Grants Portal by **July 15, 2019**. The full application is comprised of two main components: the SMU DataArts Cultural Data Profile Survey and the main application.

CULTURAL DATA PROFILE (CDP) SURVEY:

As part of TACA's grant application, all applicants must complete their SMU DataArts Cultural Data Profile (CDP) Survey, a standardized online financial/programmatic survey. **Important:** All new applicants must submit a survey for their two most recently completed fiscal years. All current 2019 TACA Grant Recipients must submit a survey for their most recently completed fiscal year.

In addition to completing your CDP Survey through SMU DataArts, TACA requires you to submit a copy of your CDP Funder Report in the application as well as supplementary information (if applicable).

To learn more about the CDP survey, visit the [SMU DataArts website](#).

WHY USE THE CDP SURVEY?

SMU DataArts is an independent non-profit with experience in data collection, security and analysis. Their mission is to empower the cultural sector with high-quality data and resources to strengthen nonprofits' vitality, performance, and public impact. Their flagship service, the Cultural Data Profile (CDP), is used by thousands of cultural organizations each year, including TACA.

SMU DataArts offers an unparalleled longitudinal dataset, including financial, programmatic and operational information from thousands of cultural nonprofits. An essential resource for a range of research studies, they give advocates the evidence to make a more powerful case for the value and impact of the arts, which TACA fully supports.

SMU DataArts also can support our applicants and the work that they do. Data provided to SMU DataArts serves multiple purposes. With it, applicants can apply for grants, get a clear picture of your organization’s progress, inform your decision-making, and make a stronger case to stakeholders.

MAIN APPLICATION:

The main application will consist of questions and attachments that tie to our evaluative criteria, which can be found under the ‘Review Process & Criteria’ section of these grant guidelines.

APPLICATION SUBMISSION:

All application materials must be submitted via the TACA Grants Portal system by Friday, September 27, 2019, at 5:00 p.m. CST. Please make sure you receive an email confirmation after submitting your application. Late applications will NOT be accepted.

REVIEW PROCESS & EVALUATIVE CRITERIA

The review process will consist of a Staff Review, Panel Review, and TACA Grants Committee and Board review based on the following evaluative criteria:

GENERAL ARTS – EVALUATIVE CRITERIA:

35 Points	Artistic Excellence
20 Points	Innovation & Originality
20 Points	Advancement of Local Creation and/or Artists
15 Points	Equity, Diversity, Inclusion & Access
10 Points	Financial/Administrative Stewardship & Capacity

YOUTH PERFORMING ARTS – EVALUATIVE CRITERIA:

40 Points	Artistic Excellence
30 Points	Equity, Diversity, Inclusion & Access
20 Points	Innovation & Originality
10 Points	Financial/Administrative Stewardship & Capacity

For a detailed description of the evaluative criteria, please consult the evaluative criteria attachments to these Grant Guidelines.

STAFF REVIEW:

Upon receipt of the applications, TACA staff will review applications for completeness. When necessary, applicant organizations will be asked to revise application materials or supply additional information. **Incomplete applications will not be considered for funding.** Applicants that do not submit all of the required support materials by the appropriate deadlines will not be eligible for further consideration. Applications submitted to TACA become the property of TACA.

PANEL REVIEW:

Volunteer grant panels are comprised of civic leaders, arts professionals, artists, community and corporate volunteers, arts advocates and others with arts expertise. Each volunteer panelist is required to review public programming of applicants in their respective panel throughout calendar-year 2019. TACA believes that by having our panelists experience art live/in-person, they are better equipped to fairly and accurately evaluate applicant organizations and their activities.

In addition to live/in-person observations, each panelist is required to review and evaluate the applications of each applicant organization in their respective panel.

Panels will convene December 2-6, 2019 to discuss and collectively score each applicant organization based upon their observations, their review of each application, the financial report given by the panel's designated Financial Reviewer and the panel discussion of each applicant organization.

TACA has a conflict of interest policy for panelists. Panelists must declare any potential conflict of interest regarding the organizations being reviewed by their specific panel. Panelists who have a conflict of interest with a particular organization may not score that applicant or participate in the discussion of that application.

TACA staff do not score applications. Rather, TACA staff manages all administrative and logistical tasks necessary to conduct a successful panel review, which include:

- Providing panelists with training and materials to ensure that they are able to evaluate applications and performances effectively
- Informing panelists of TACA policies and procedures
- Providing all available objective information regarding applicant organizations to the panel

AWARD DETERMINATION:

An organization's recommended award, if any, is determined by TACA's grant formula process, which takes into account the following factors:

- Budget size
- Budget multiplier (or percentage range based on budget size)
- Panel review score
- Quantity of applications received

- Amount of funds available for the grant program
- Minimum TACA grant award amount of \$5,000
- Maximum TACA grant award amount of \$50,000

TACA GRANTS COMMITTEE, BOARD REVIEW & APPROVAL:

Funding recommendations from panels, based upon the total panel score and the grants formula, are forwarded to the TACA Grants Committee for review and approval. The committee, in turn, forwards its recommendations to the TACA Board of Directors for final approval.

DECISION NOTIFICATION:

Applicant organization will be notified of TACA funding decisions in mid-January 2020. Regardless of funding decision, panel comments/feedback and applicant evaluative criteria scores will also be communicated.

REST PERIOD:

If your organization has been declined funding from TACA for two consecutive grant cycles, the organization must take a mandatory one-cycle rest period from applying for a TACA grant. After the rest period, the organization may be re-eligible to submit a LOI.

GRANT REQUIREMENTS

RECOGNITION REQUIREMENTS:

Grant recipients are required to include the TACA logo in all appropriate promotional materials including, but not limited to, take-ones, playbills, brochures, websites, and posters. Recipients are required to recognize TACA at the donor level that best represents the amount awarded to your organization in this funding cycle.

REPORTING REQUIREMENTS:

TACA Grant Recipients are required to complete and submit a brief TACA Grant Final Report at the end of the grant term. The report form will be available digitally through the [TACA Grants Portal](#). More information on this report form will be provided along with instructions toward the end of the grant term. Completion of the TACA Grant Final Report is required for future funding by TACA.

KEY DATES

March 1, 2019 by 5:00 p.m. (CST)	Letter of Interest (LOI) submission deadline
March 2019 – July 2019	Debut Interview Process
July 15, 2019	Eligibility to apply notification; Full application available
September 27, 2019 by 5:00 p.m. (CST)	Online application submission deadline
Mid-January 2020	Notification of funding award or decline

CONTACT INFORMATION

Organizations interested in applying for an Arts General Operating Grant are encouraged to become familiar with the granting guidelines, application requirements and evaluative criteria before beginning the application process. If you have any questions about eligibility of your organization or the granting process, please do not hesitate to contact Greg Oertel, Programs & Marketing Manager, at greg.oertel@gmail.com or by calling 214.520.3930.

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General Arts Evaluative Criteria

TACA grant applicants are evaluated on the following criteria by looking at the entirety of an applicant organization and its programming throughout the year.

ARTISTIC EXCELLENCE (35 POINTS):

Artistic Excellence is a subjective measurement shaped by age, gender, race, and many other factors. TACA believes Artistic Excellence should be reflected in the programming, artists, and overall artistic quality, as well as in the artistic significance of the programming. Technical proficiency and artistry in the execution of the final artistic product is important, as is the quality of the impact relative to the audience. Some of the things TACA looks for when evaluating this criterion include, without limitation:

- A commitment to continuous improvement on the part of arts organizations, artists and artistic staff
- Inspirational, transformative and impactful artistic product
- Strong and diverse artistic programming
- Available resources are used effectively to produce content of the highest artistic merit
- Demonstrated track record of artistic achievement (i.e., awards, recognitions, etc.)
- Demonstrated vision and leadership of the artistic planning/curatorial staff

INNOVATION & ORIGINALITY (20 POINTS):

TACA believes the desire and ability to innovate and the willingness to take risks are important for any organization striving to achieve artistic excellence. To foster creativity, organizations should explore new artistic and administrative approaches to their work. TACA encourages organizations to challenge themselves, take risks, implement innovative ideas and strive for a culture of innovation. Some of the things TACA looks for when evaluating this criterion include, without limitation:

- Organization's unique value proposition
- Pipeline of new programming ideas
- Regular internal reviews of programming, audience engagement, product delivery, technology, organizational structure, etc. that may benefit from a new approach
- Effective use of partnerships with other organizations
- Distinctive programming that advances the field
- Are original artistic works, exhibitions or programs of an organization reproduced by or shared with other organizations?

ADVANCEMENT OF LOCAL CREATION AND/OR LOCAL ARTISTS (20 POINTS):

TACA believes it is important to have a healthy and stable community of local artists, both creators and performers, as well as local technical expertise. Thus, in awarding grants, TACA wants to assist organizations that support and/or advance local creation of art and local artists

and technical expertise. Some of the things TACA looks for when evaluating this criterion include, without limitation:

- Programming supports the creation of art locally and/or local artists
- Use of imported artistic talent or technical expertise that is of a caliber that it will elevate the local artistic community
- How is artistic talent compensated?
- Number of artists supported

EQUITY, DIVERSITY, INCLUSION & ACCESS (15 POINTS):

TACA believes it is important that arts opportunities are accessible to and reflective of our Dallas community. Some of the things TACA looks for when evaluating this criterion include, without limitation:

- Programming reaches or has the potential to reach those whose opportunities to experience the arts are limited by geography, economics, disability or any other factors
- Organization is making efforts to be inclusive of and accessible to individuals from diverse demographic backgrounds of the community
- Organization creates work about, by, for and/or near a culturally diverse community as a central part of its mission
- Artistic product is relevant to people of different cultures and backgrounds
- Organization endeavors to involve individuals of different backgrounds at the artistic, technical, administrative and board levels
- Effective use of relevant technology to engage a larger, broader, more diverse constituency
- Programming broadens perspectives and exposes audiences/patrons to new ideas or themes
- The racial/ethnic and age diversity of audiences/patrons
- Frequency of arts opportunities
- Patron experience (e.g. ease of buying tickets, locating arts programming, etc.)

FISCAL/ADMINISTRATIVE STEWARDSHIP & CAPACITY (10 POINTS):

It is important for TACA to know that the organizations it supports through grants are financially and administratively responsible, stable, and have long-term viability in the community. Some of the things TACA looks for when evaluating this criterion include, without limitation:

- Demonstrates good board governance, active board engagement and growth
- Demonstrates history of successful operations and fundraising

- Evidence of reasonable operating metrics (sources/uses of revenue, expense management, liquidity, etc.)
- Has thoughtful and realistic strategic plan and financial path
- Has organizational capacity to achieve its short-and/or long-term goals



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Youth Performing Arts Evaluative Criteria

TACA grant applicants are evaluated on the following criteria by looking at the entirety of an applicant organization and its programming throughout the year.

ARTISTIC EXCELLENCE (40 POINTS):

Artistic Excellence is a subjective measurement shaped by age, gender, race, and many other factors. TACA believes Artistic Excellence is reflected in the programming, artists, and overall artistic quality, as well as the artistic significance of the programming. Technical proficiency and artistry in the execution of the final artistic product is important, as is the quality of the impact relative to the audience. For Youth Performing Arts organizations, TACA believes it is important to stress professionalism and high quality artistic engagement for the youth in an effort to cultivate not only future artists, but also future performing arts patrons. Some of the things TACA looks for when evaluating this criterion include, without limitation:

- A commitment to continuous improvement on the part of arts organizations, artists and artistic staff
- Inspirational, transformative and impactful artistic product
- Activities that have the potential to extend the participants' knowledge and/or skills in the performing arts
- Strong and diverse artistic programming
- Available resources are used effectively to produce content of the highest artistic merit
- Demonstrated track record of artistic achievement (i.e., awards, recognitions, etc.)
- Demonstrated vision and leadership of the artistic planning/curatorial staff

EQUITY, DIVERSITY, INCLUSION & ACCESS (30 POINTS):

TACA believes it is important that arts opportunities are accessible to and reflective of our Dallas community. Additionally, it is especially important to nurture the next generation of artists and performing arts patrons. Some of the things TACA looks for when evaluating this criterion include, without limitation:

- Programming reaches or has the potential to reach youth whose opportunities to experience the arts are limited by geography, ethnicity, economics, disability or any other factors
- Organization is making efforts to be inclusive of and accessible to individuals from diverse demographic backgrounds of the community
- Artistic product is relevant to people of different cultures and backgrounds

INNOVATION & ORIGINALITY (20 POINTS):

TACA believes the desire and ability to innovate and the willingness to take risks are important

for any organization striving to achieve artistic excellence. To foster creativity, organizations should explore new artistic and administrative approaches to their work. TACA encourages organizations to challenge themselves, take risks, implement innovative ideas and strive for a culture of innovation. This criterion is especially important in the Youth Performing Arts category as exposure to artistic innovation will help encourage creative thinking in our youth. In this area, applicants will not be evaluated performance-by-performance, but by looking at the entirety of an organization and its programming. Some of the things TACA looks for when evaluating this criterion include, without limitation:

- Organization's unique value proposition
- Pipeline of new programming ideas
- Regular reviews of programming, audience engagement, product delivery, technology, organizational structure, etc. that may benefit from a new approach
- Effective use of partnerships with other organizations to develop new programming or implement new strategies – either artistic or administrative
- Distinctive programming that advances the field
- Are original artistic works, exhibitions or programs of an organization reproduced by or shared with other organizations?

FISCAL/ADMINISTRATIVE STEWARDSHIP & CAPACITY (10 POINTS):

TACA supports and promotes local arts organizations. Thus, it is important for TACA to know that the organizations it supports through grants are financially and administratively responsible, stable, and have long-term viability in the community. Some of the things TACA looks for when evaluating this criterion include, without limitation:

- Demonstrates good board governance, active board engagement and growth
- Demonstrates history of successful operations and fundraising
- Evidence of reasonable operating metrics (sources/uses of revenue, expense management, liquidity, etc.)
- Has thoughtful and realistic strategic plan and financial path
- Has organizational capacity to achieve its short-and/or long-term goals