

# **Houston Arts Alliance**

## **GRANTS FOR ORGANIZATIONS**

**Guidelines  
FY 2010-2011**

**3201 Allen Parkway, Suite 250  
Houston, TX 77019  
(713) 527-9330  
[www.haatx.com](http://www.haatx.com)**



### Accessibility and Special Needs

Houston Arts Alliance works to make its grant application process, assistance and workshops open to all interested parties. If you would like to attend a Houston Arts Alliance grants workshop and need special accommodations, please contact Houston Arts Alliance staff one week in advance (if possible) at (713) 527-9330.



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### Houston Arts Alliance

3201 Allen Parkway, Suite 250  
Houston, TX 77019-1800  
Phone: (713) 527-9330  
Fax: (713) 630-5210  
Website: [www.haatx.com](http://www.haatx.com)

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Joseph R. Wilson, <i>Director of Grants</i>	Piper H. Faust, <i>Civic Art &amp; Design Coordinator</i>
Crystal Benavides, <i>Grants Coordinator</i>	

# Houston Arts Alliance

February 2010

Dear Members of the Houston Arts Community:

It is with great pleasure that we present the Fiscal Year 2011 Guidelines to Grants for Organizations of Houston Arts Alliance. These recently revised Guidelines outline the funding and application process for nonprofit arts and cultural organizations and other nonprofits interested in presenting or producing artistic and cultural activities in the City of Houston.

Houston Arts Alliance is the City of Houston's partner for the distribution of municipal Hotel Occupancy Tax receipts to support arts and cultural programs in the city. The City of Houston's significant investment in the arts reaches organizations of all sizes and artistic disciplines—from experimental visual arts and performance groups, to nationally renowned museums and performing arts institutions, to culturally specific organizations that reflect Houston's diverse populations. We are proud of our long association with the City of Houston and applaud our city leaders for their long-time commitment to investing in the arts for the benefit of our community. The creative endeavors of Houston's nonprofit arts organizations truly make our city a better place to live, work and visit— indeed, one of the most culturally-rich communities in the country!

The FY2011 Guidelines reflect changes introduced to streamline the application process, maintain the accountability necessary for the disbursement of public funds and keep up with changes made by the Houston Arts Alliance board. Our focus remains on supporting the wide variety of artistic and cultural programming that is the hallmark of Houston's nonprofit arts industry. You are required to read these Guidelines prior to beginning the application process and encouraged to attend one of the workshops offered.

We look forward to receiving your application and working with you to serve the citizens and visitors of Houston through the arts.

Sincerely,

Jonathon Glus, CEO

Joseph R. Wilson, Director of Grants

# IMPORTANT DATES

## General Operating Support, General Operating Support Expansion and Arts Project Grants

<b>Grant Period or Grant Term</b>	July 1, 2010 –June 30, 2011
<b>Deadline to Apply</b>	March 5, 2010 7:00 P.M. ( <b>ONLINE</b> )
<b>Deadline for Required Support Materials</b>	March 10 2010, 5:30 P.M. (RECEIVED IN OUR OFFICES) <b><u>NOT A POST MARK DEADLINE</u></b>
<b>Deadline for Continuation</b>	March 10, 2010, 5:30 P.M. (RECEIVED IN OUR OFFICES) <b><u>NOT A POST MARK DEADLINE</u></b>

## Grant Application Workshops Dates and Locations

Day	Date	Time	Topic	Location
THURSDAY	February 11, 2010	12:00 p.m.	Operating Support/Arts Project Grants & New Applicants	Houston Arts Alliance
MONDAY	February 15, 2010	12:00 p.m.	Operating Support	Houston Arts Alliance
MONDAY	February 15, 2010	5:30 p.m.	Arts Project Grants New Applicants	Houston Arts Alliance
THURSDAY	February 18, 2010	12:00 p.m.	Operating Support/Arts Project Grants & New Applicants	Looscan Library Large Conference Room 2510 Willowick, Houston, TX 77027
FRIDAY	February 19, 2010	12:00 p.m.	Operating Support/Arts Project Grants & New Applicants	Heights Neighborhood Library Meeting room 1302 Heights, Houston, TX 77008
WEDNESDAY	February 24, 2010	12:00 p.m.	Arts Project Grants New Applicants	Houston Arts Alliance
WEDNESDAY	February 24, 2010	5:30 p.m.	Operating Support	Houston Arts Alliance
FRIDAY	February 26, 2010	12:00 p.m.	Continuation Workshop	Houston Arts Alliance
SATURDAY	February 27, 2010	12:00 p.m.	Operating Support/Arts Project Grants/New Applicants	Houston Arts Alliance

## ELIGIBILITY AT-A-GLANCE

All organizations applying for Houston Arts Alliance grants must be 501(c)(3) non-profit, public charity organizations (or the equivalent) in good standing with the Internal Revenue Service and received their IRS recognition at least one year prior to application date.

Grant categories are open to specific types of organizations. Not all grant programs are open to all types of organizations. Please read the appropriate sections carefully for complete information on eligibility.

### Type of Organization

### Eligible to Apply For

Arts and Cultural Organizations	General Operating Support (if average of previous two year Cash revenues exceeds \$50,000)
Arts and Cultural Organizations	Arts Project Grant only (if average of previous two year Cash revenues less than \$50,000)
Multicultural Arts Organizations	General Operating Support Expansion (if average of previous two year Cash revenues exceeds \$50,000)
Multicultural Arts Organizations	Arts Project Grant only (if average of previous two year Cash revenues less than \$50,000)
University/Education Agencies, Departments & Organizations	Arts Project Grant only as of FY2011
Other Nonprofit Organizations	Arts Project Grant only

# OVERVIEW OF THE GRANTS PROGRAM

Houston Arts Alliance seeks to advance the nonprofit arts industry in Greater Houston through its public/private partnership with the City of Houston. To support and promote the arts and to develop audiences in the Greater Houston area, the grants program provides a variety of financial aid programs that assist small, medium and large non-profit organizations and individual artists in creating work of the highest artistic merit. HAA strives to support artistic programs that make Houston an attractive cultural destination and a lively community for its residents.

Serving the Greater Houston area, Houston Arts Alliance's efforts directly benefit approximately 200 organizations that are committed to providing quality artistic programming to residents and visitors to the Greater Houston area. Houston Arts Alliance's various programs are supported principally by the City of Houston with additional funding from Harris County, Texas Commission on the Arts, and private donations. For information on other programs, please visit our website: [www.haatx.com](http://www.haatx.com).

## Need Assistance?

Houston Arts Alliance staff assists applicants through a series of Application Workshops to answer questions, offer tips for success, and discuss the application process before applications are submitted. To assist both new and renewing applicants, grant workshops are offered through February (listed on page 4).

All applicants are required to read the guidelines and application instructions to become familiar with the program requirements and criteria before beginning the application process. To speak with Grants staff at Houston Arts Alliance or to make an appointment, please call (713) 527-9330 or email us at:

<b>Liz Alexander, Grants Coordinator</b>	<b><a href="mailto:liz@haatx.com">liz@haatx.com</a></b>
<b>Crystal Benavides, Grants Coordinator</b>	<b><a href="mailto:crystal@haatx.com">crystal@haatx.com</a></b>
<b>Joseph R. Wilson, Director of Grants</b>	<b><a href="mailto:joe@haatx.com">joe@haatx.com</a></b>

## Who Must Attend Workshops

All first time applicant organizations and former applicants who were not approved for funding or have not applied in the past two years are required to attend an application workshop prior to applying. Workshop dates and times listed on page 4. As Guidelines change periodically, all other applicants are strongly encouraged to attend as well.

## The Grants for Organizations Program

Houston Arts Alliance's Grants for Organizations Program provides support to small, medium and large nonprofit arts and cultural organizations to assist in carrying out our mission of nurturing, funding and promoting participation in the arts, by both visitors and residents, in the City of Houston. The Grants for Organizations Program supports the encouragement, promotion, improvement and application of the arts to promote tourism and the convention and hotel industry. Most of the funding is specific to nonprofit arts and cultural organizations, although small grants are available to other nonprofits that present or produce arts programs or events in the City of Houston consistent with the promotion and enhancement of Houston as a cultural destination.

# Types of Support Available for 2011

## General Operating Support and General Operating Support Expansion

This category is open only to nonprofit arts and cultural organizations with two year average cash revenues in excess of \$50,000 as determined by their IRS 990s. The ‘Expansion’ component of General Operating Support is open only to multicultural arts organizations (as defined on page 15). Because funding for this category is from the City of Houston Hotel Occupancy Tax, funded organizations may use the funds only for arts programs that serve to promote tourism and the convention and hotel industry. First-time and former applicant organizations that have not received a Houston Arts Alliance Operating or Arts Project panel-reviewed grant in the past two years will be considered ‘former’ applicants and are not eligible for General Operating Support; these organizations may apply for an Arts Project Grant (pending eligibility for that category). Organizations whose primary arts activities may not meet the Hotel Occupancy Tax requirements are advised to select those arts activities that meet the tax statute requirement and apply for an Arts Project Grant. An organization’s maximum eligible request is a percentage of the average allowable cash revenues for the two most recently completed fiscal years as calculated on the Maximum Eligibility Request (MER) worksheet.

## Arts Project Grants

This category is open to arts organizations with two year average cash revenues of less than \$50,000 as demonstrated by their IRS 990 reports, university related organizations/departments and educational institutions and non-arts nonprofits (community and civic organizations, social service organizations, etc.) that produce or present arts and cultural activities that are open to the public and are eligible for funding through the Hotel Occupancy Tax. Organizations whose primary arts activities may not meet the Hotel Occupancy Tax requirements are advised to select those arts activities that meet the tax statute requirement and apply for Arts Project Grant support. First time and former applicants and arts/cultural and multicultural organizations that have not received a Houston Arts Alliance Operating or Project panel-reviewed grant in the past two years need to apply in this category. Because funding for this category is City of Houston Hotel Occupancy Tax, the funded projects should impact tourism and the hotel and convention industry. The maximum request is \$10,000, not to exceed 25% of the average of the two previous year’s cash revenues. In addition, the request cannot exceed 50% of project cash costs.

No organization may receive total grants from Houston Arts Alliance from all sources for more than 50% of the organization’s cash revenues for the most recently completed fiscal year.

For specific details on eligibility and program criteria for these two funding categories, please see pages 25–31.

## Other Arts Grant Programs

Pending funding availability, Houston Arts Alliance offers other grant opportunities from time to time. In the past, these have included a Touring & Neighborhood Arts Project grant category, an organizational development program (MODE) and the City’s Special Initiative grant program. As funding is confirmed for those and other grant opportunities, Houston Arts Alliance will publish separate guidelines and post the guidelines and application information at our website, <http://www.haatx.com>. Harris County organizations outside the City of Houston may apply to Houston Arts Alliance for its Touring & Neighborhood Arts Program (visit our website for details: [www.haatx.com](http://www.haatx.com) . All eligible organizations are encouraged to apply annually for additional support from Texas Commission on the Arts and National Endowment for the Arts.

## Source of Grant Funds

Funding for Houston Arts Alliance's General Operating Support, General Operating Support Expansion and Arts Project Grant categories is provided by the City of Houston utilizing Hotel Occupancy Tax receipts. Each year, the City allocates 19.3% of the municipal Hotel Occupancy Tax receipts to support arts and cultural organizations, as permitted by the Texas Tax Code, through an annual agreement with Houston Arts Alliance.

The use of Hotel Occupancy Tax is defined in the Texas Tax Code, Chapter 351. Per state law, revenue from the municipal Hotel Occupancy Tax may be used only to promote tourism and the convention and hotel industry. The Texas Tax Code is very specific in the allowable uses of the Hotel Occupancy Tax, mandating that funds derived from this tax shall be expended in a manner directly enhancing and promoting tourism and the convention and hotel industry. Among the permitted uses in this context are the following related to arts and cultural activity:

- The encouragement, promotion, improvement, and application of the arts, including instrumental and vocal music, dance, drama, folk art, creative writing, architecture, design and allied fields, painting, sculpture, photography, graphic and craft arts, motion pictures, radio, television, tape and sound recording, and other arts related to the presentation, performance, execution, and exhibition of these major art forms [Texas Tax Code Section 351.101(a) (4)].
- Historical restoration and preservation projects or activities or advertising and conducting solicitations and promotional programs to encourage tourists and convention delegates to visit preserved historic sites or museums at or in the immediate vicinity of convention center facilities or visitor information centers or located elsewhere in the municipality or its vicinity that would be frequented by tourists and convention delegates [Texas Tax Code Section 351.101(a)(5)].

Organizations applying for and receiving Hotel Occupancy Tax funds are required to adhere to the state laws governing the use of such funds. Only organizations based in the City of Houston are eligible to receive Hotel Occupancy Tax funds for activities that meet the purposes described above. The complete details of the State of Texas Hotel Occupancy Tax Code may be found at our website [www.haatx.com](http://www.haatx.com).

## Basic Eligibility Requirements for All Applying Organizations

In order to be eligible to apply for funding, an organization must have received its IRS 501(c)(3) designation as a public charity no later than February 26, 2009 and maintain the designation current with the IRS; have a history of ongoing artistic/cultural programs for at least one year prior to the application deadline; and be able to submit financial reports to document its revenues and expenses for one full year prior to the application deadline. All applicants for General Operating Support and General Operating Support Expansion must have filed the required 990IRS reports and said reports posted on [www.Guidestsar.org](http://www.Guidestsar.org).

Through its grant programs, Houston Arts Alliance encourages programming that embraces the needs of all cultures, including African, Asian, Hispanic, Native American peoples, women and people with disabilities.

## Size of Grant Awards

Grant requests to Houston Arts Alliance far exceed the funds available for awards. Therefore, an applicant rarely, if ever, receives 100 percent of its request. For example, in fiscal year 2010 Houston Arts Alliance awarded \$2,733,820 in general operating support & expansion grants through our competitive grant category while requests exceeded \$5.4 million.

The size of each grant award is determined by the following factors: (1) amount of funding available as projected by City; (2) peer panel score of the application; (3) Maximum Eligible Request amount as determined by worksheet (general operating grants only); (4) number of awards; and (5) quantity of applications. In the panel review process, applications earn points. The higher the score of the application, the larger the percentage of request that will be awarded. Please note that City projections are dependent upon taxes collected.

## Submitting the Grant Application

For this grant program, Houston Arts Alliance uses an online application system to facilitate the application process. All organizations required to submit full applications for General Operating Support and Arts Project Grants must be submitted through this online system. Late, incomplete or hand written applications will not be accepted. Information is available at our website at [www.haatx.com](http://www.haatx.com).

## 50 Percent Rule

Houston Arts Alliance encourages organizations to seek funding from a variety of sources—both unearned (and contributed) and earned. In order to encourage organizations to diversify their funding, total grants awarded to an organization from all possible Houston Arts Alliance grant programs may not exceed 50% of the organization's previous year's cash revenues as verified by their IRS 990 (if applicable) or their previous year's financial statement. This 50 Percent Rule applies whether an organization applies for only one grant or more than one grant in a fiscal year.

If an organization submits applications to Houston Arts Alliance for more than the organization's 50 percent amount, Houston Arts Alliance will adjust the request amount to the 50 percent amount.

## Term of Grant Support

The period of support for this grant cycle is July 1, 2010 through June 30, 2011. Grant funds cannot be used for budgeted expenses incurred prior to or after the grant term and the matching funds required for the grant must be collected during the grant term. A Final Report will be due no later than August 15, 2011.

The grant term begins July 1, 2010. Houston Arts Alliance plans to notify applicants of their preliminary grant award before the term begins (pending approval of the City contract and the HAA board). This preliminary notification is intended to assist grantees with budget planning. Grant Agreements will not be mailed out with actual award amounts until organization's prior grant reports have been received and approved.

All grantees are required to register with Dun & Bradstreet. Information is available online at [www.dnb.com/us/](http://www.dnb.com/us/). There is no cost to an organization and it assists HAA in researching the economic impact of the arts in Houston.

**For all General Operating Support & General Operating Support Expansion applicants, FY08 & FY09 990s must be filed on the web database used by the IRS known as Guidestar.org, no later than May 20, 2010. If the FY08 & FY09 IRS 990s are not available, then Houston Arts Alliance will temporarily base Maximum Eligible Request on the two most previous verifiable financial reports. (These can be previous 990 reports or Internal Annual Financial reports signed by Board Treasurer). No payments can be made until both the FY08 and FY09 IRS 990 are on file with Guidestar.org. To speed up the process, organizations can self-submit their 990s on Guidestar.org. Please visit Guidestar.org for instructions on creating an account and posting your 990's. To post the 990's your organization may be charged a nominal fee.**

## Application Review Process

Applications received by Houston Arts Alliance undergo a multi-step review process that includes staff, peer and board review.

**Staff Review:** Upon receipt of the applications, staff reviews applications for completeness and eligibility and verification of the 501(c)(3) status. When necessary, applicants are asked to revise proposals or supply additional information. Incomplete applications or those that do not meet eligibility requirements cannot be considered and will be returned to applicants. Applicants that do not submit all of the Required Support Materials by the appropriate deadlines will not be eligible for consideration. All Organizations are now required to file a 990 or 990 EZ form with the Internal Revenue Service. Staff will verify the IRS 990's using Guidestar.org. **The 990's must be posted to Guidestar.org by May 20, 2010.**

Please note that Houston Arts Alliance grants are funded from public tax dollars and, as such, grant records may be subject to the Texas Open Records Act. Applications submitted to Houston Arts Alliance become the property of Houston Arts Alliance and are subject to review by members of the public upon request.

**Peer Panel Review:** Peer panels, consisting of objective and knowledgeable arts professionals, artists, community and corporate volunteers and others with arts expertise, evaluate each application using the published funding criteria. Panelists meet to discuss and score each eligible application; their scores are totaled and averaged for each application following the panel meetings.

- Most Panel meetings are open to the public for observation only. Members of the public interested in attending a panel meeting who need special accommodations are asked to notify Houston Arts Alliance grants department one week prior to the panel meeting (if possible).
- Addressing the Panel: All grant applicants are given a set time to respond to questions from the panel or to clarify any comments made by the panel during the review process. **All applicants are required to have an informed representative(s) attend their review time. If representatives cannot be present, they must make arrangements with HAA at least 24 hours in advance to be available by phone during the panel meeting.** The representative(s) must be able to answer questions about the organization's operations and programs, budget and finances, and the specifics of the application. HAA strongly encourages the Executive Director or CEO to be the designated representative. No new materials may be distributed to the panel at this time.
- An organization's application should stand on its own. Site visits are no longer a part of the review process. Any previous grant report may be reviewed by the panel as well. While panelists are encouraged to attend applicant events and be familiar with the organization, it is the primary responsibility of the applicant to inform the panel about the applicant's activities and programs through the best quality submission of the online application and support materials and to send an informed representative(s) to answer questions from the panel during the organization's peer panel review time.
- Houston Arts Alliance has a Conflict of Interest Policy for panelists. Panelists must declare their conflicts of interest regarding the organizations being reviewed by their specific panel. Panelists may neither review nor score applicants with whom they have a fiduciary, personal or adversarial relationship currently or in the past twelve months or projected grant term. Panelists who have a conflict of interest with an applicant must leave the panel meeting during the discussion of that application.

Nominations for panelists are accepted throughout the year. Please visit Houston Arts Alliance web site ([www.haatx.com](http://www.haatx.com)) for a nomination form.

**Board Review:** Grant recommendations are forwarded to Houston Arts Alliance Grants Committee for review. The committee, in turn, forwards its recommendations to Houston Arts Alliance Board of Directors for final approval. These recommendations are subject to organizations meeting all requirements prior to issuing a grant agreement. Organizations that are not funded may be recommended to attend HAA workshops or other training for further assistance.

## Reconsideration Process

Houston Arts Alliance is committed to awarding grants in a fair and equitable manner. If there is evidence that a review panel acted in an unfair manner, an applicant may submit a request for reconsideration. The request for reconsideration must demonstrate that:

1. Houston Arts Alliance failed to follow published application and review procedures and such failure impacted the panel's decision;
2. The panel acted in an unfair manner; or
3. The panel's decision was based on insufficient information through no fault of the applicant.

Note that requests based upon scoring must be at least a 10% variance from previous total scores.

All reconsideration requests must be submitted in writing by 5:30 P.M. Friday, September 3, 2010. The Grants Committee will review the written requests and determine which requests may merit a personal meeting with the committee. After reviewing the request(s) the committee forwards its recommendations to Houston Arts Alliance Executive Committee and/or Board of Directors for final approval. No requests for Reconsideration may be accepted after September 3, 2010.

Note that HAA Grants Committee may alter these rules and Guidelines or make special exceptions subject to approval of HAA board or Executive Committee.

## **Required Support Materials**

**An organization's application should stand on its own.** Applications and support materials should be prepared and submitted so that peer review panelists will have at hand all the information they will need to make informed decisions about the grant proposal.

## **Importance of the Application and Required Support Materials**

Each grant application has Required Support Materials that must be submitted by the appropriate deadline in order for the grant application to be considered. The Required Support Materials for each grant category and the deadline by which they must be received are described in the specific grant sections that follow. Please note that failure to submit the Required Support Materials by the appropriate deadline will render the application ineligible for consideration.

Applications submitted to the Houston Arts Alliance will be copied and distributed to members of the peer review panel and/or the Houston Arts Alliance Board of Directors and other committee members for the sole purposes of reviewing applicants. Organizations are required to submit multiple copies of support materials as noted in final check list.

## **Tickets to Performances, Exhibitions and Other Programs**

Peer review panelists are encouraged to see the performances, exhibitions, activities and programs of the organizations applying to their assigned panel. Applicants are advised to make complimentary tickets available to panelists. Applicants should notify Houston Arts Alliance of all public performances, exhibitions, and activities occurring in February and March of 2010.

Please note that the role of the panelist assigned to an organization is not to be an advocate for this organization in the panel review process, but to be an informed presenter and be able to articulate both the strengths and weaknesses of the application. Panelists may not discuss the proceedings of the panel meetings with the applicants and any post-panel questions from applicants should be directed to Houston Arts Alliance staff.

## **Items Ineligible for Grant Funds**

For grants funded with Hotel Occupancy Tax, funds may not be used for activities, programs or events or their administrative costs that are not consistent with the intent of the Hotel Occupancy Tax as defined in Sections 351.101(a)(4-5), 351.101(b) and other applicable sections of the Texas Tax Code. Additionally, Houston Arts Alliance grant funds ***may not*** be used for:

1. Capital improvements (construction, renovation, the purchase of permanent (or non expendable) equipment or real property, unless expressly authorized in the Hotel Occupancy Tax legislation).
2. Funding deficits or budgeted expenses incurred prior to July 1, 2010 or after June 30, 2011.
3. Expenses associated with touring programs or other travel outside of City of Houston, except for artists/experts being brought in to City of Houston.
4. Tuition costs or costs of instructional programs that have primary impact on individuals or small groups.

5. Organizations whose physical administrative offices are outside of the City of Houston.
6. Projects or events that are extensions of training or academic programs for which participants receive academic credit.
7. Costs related to performances funded by Miller Outdoor Theatre or already funded by Hotel Occupancy Tax.
8. Programs not open and advertised to the general public.
9. Scholarships, purchase of awards or cash prizes.
10. Benefits, galas and projects planned primarily for fundraising.
11. Licensing fees of any kind other than performance royalties.
12. Loans, interest on loans, fines, penalties or costs of litigation.
13. Refreshments, beverages, social functions, parties or receptions.
14. Individuals or projects by individuals (these are funded through Houston Arts Alliance Individual Artist Program).
15. Activities currently funded by another Houston Arts Alliance grant.
16. General Operating support grants may not go to University/college or other education agencies or departments.
17. Religious projects or activities.  
*Note:* Religious organizations or groups closely affiliated with religious organizations may receive funding if all the following conditions are met:
  - a. Funds may not be used for a direct religious purpose.
  - b. Funds may only be used to support programming of a secular purpose.
  - c. The primary effect of the funding does not advance or inhibit any one religion or faith.
  - d. The activity is open to the general public and meets the authorized uses of the Hotel Occupancy Tax.
18. Projects, productions, workshops and/or programs that include obscene material as defined in Section 43.21, Penal Code of Texas.

## How to Apply

### Submitting an Application using the eGrant Online System

Please note that our online application system is updated yearly: please plan to log in early and familiarize yourself with the system prior to the application deadline.

Houston Arts Alliance guidelines and the online application may be accessed through Houston Arts Alliance's website ([www.haatx.com](http://www.haatx.com)). We strongly encourage applicants to attend one of the Grant Orientation workshops to help with completing the application. **First time and former applicants who have not applied in the last two years are required to attend a workshop.**

- **eGrant Application System**

Eligible organizations applying in the General Operating Support, General Operating Support Expansion or Arts Project categories need to apply through the online application system as Houston Arts Alliance no longer accepts applications on paper for these grant programs.

- **Online and New Registration**

In order to begin the application process, each organization will need to establish an account. Once you have established your login and password, you will need to select the program to which you are applying from the drop-down list provided; then, click the "Create New Application" link. From that point on, you do not create another application, but use the "Edit" button to work within your application.

If you have created an account in the past please use the same access information, if you are new to the eGrant System you will need to create a login and password.

Organizations will need to provide an email address. Please make sure that the email address you provide is accurate as it will be used for primary contact during the application process and ongoing correspondence with the organization if grant awarded.

A "Houston Arts Alliance eGrant Registration Confirmation" email will be sent to an applicant once all of the required information has been entered. You should click "**Proceed**" to begin using the site.

- **Filing the Application**

When an application is successfully filed with Houston Arts Alliance, the applicant is notified via email. The applicant then must submit the Required Support Materials by the March 10, 2010 deadline.

Applicants are required to read Houston Arts Alliance Grant Guidelines and the application instructions before filling out and submitting the application. Applicants are encouraged to contact Houston Arts Alliance Grants staff with any questions about the application.

Applicants may type or "copy-and-paste" text into the application. We strongly recommend that you "copy-and-paste" from a word-processing program. This will allow you the opportunity to check for grammatical and spelling errors as well as the word count. When cutting and pasting from a word-processing document, use a standardized font (Times Roman or Arial) and a text-only format with no specialized punctuation or characters (such as underline, quotation marks, italics or special fonts).

As you complete each page, be sure to click one of the "**Save**" buttons at the bottom of the screen. Otherwise, **you will have to reenter the information. Remember you may only make changes in "Edit;" "View" is for reading only.**

Please note that when answering the "Questionnaire," applicants should keep in mind the appropriate criteria by which each application will be evaluated: (1) artistic/cultural merit; (2) administrative ability; (3) audience development & community outreach; and (4) impact on tourism and the convention and hotel industry. Please answer each question as clearly and concisely as possible. It is important not to assume that the panel is familiar with your organization.

## **After Receiving a Grant**

Organizations that are awarded grants by Houston Arts Alliance will enter into a grant agreement that outlines the requirements of the grant. The agreement will clearly state the scope of services and all grant funds should be used for these stated activities to help simplify reporting. All grantees are required to register with Dun & Bradstreet. Information is available online at [www.dnb.com/us/](http://www.dnb.com/us/). There is no cost to this and it assists HAA in researching economic impact of the arts in Houston. This DUNS number is also used for any application you make to Texas Commission on the Arts.

- **Signing the Grant Agreement**

Houston Arts Alliance requires that two authorized officials from the grantee organization sign the agreement. One of these officials must be the board chair or president. If the CEO and board president or chairman is the same person, then another non-related officer must sign as second signature. The Grant Agreement will outline the terms of the grant, scope of services, reporting requirements and legal issues applicable to the funding.

- **Grant Payments**

Grant payments are made in quarterly installments, following the distribution of Hotel Occupancy Tax funds to Houston Arts Alliance from the City of Houston. Generally, the initial payment will be made after October 15, 2010, after execution of the grant agreement, second payment after January 15, 2011, third payment after April 15, 2011, and the last payment in August or September 2011, upon submission and approval of the Final Report. For the first, second and third installments, a Scope of Services/List of Activities update is required prior to issuance of the payment (see details below). Grantees with outstanding reports from previous years are not eligible to receive payments until the previous grants are closed-out and are ineligible for any grants if they are in default of a previous grant. Late penalties may apply (see below).

## Reporting Requirements

- **GOS/GOSE** Grantees receiving General Operating Support or General Operating Support Expansion support from Hotel Occupancy Tax are required to provide a List of Funded Activities from which the Scope of Services will be created for the agreement, and to update this list quarterly as new activities or changes to previous activities for which the grant will be used are added. This list, required per Texas Tax Code Section 351.108, should include each scheduled activity, program, or event as well as date and exact location address that: (1) is directly funded by the tax or has its administrative costs funded in whole or in part by the tax; and (2) is directly enhancing and promoting tourism and the convention and hotel industry. The List of Activities, in a form provided by Houston Arts Alliance, must be received prior to the issuance of the first, second and third payments. Additionally, grantees are asked to notify Houston Arts Alliance of changes to the programs and activities proposed in the application.
- **ARTS PROJECTS Grantees** receiving Arts Project support from Hotel Occupancy Tax are required to provide a Grant Revision Form with List of Funded Activities from which the Scope of Services will be created for the agreement and to update this form as changes to activities for which the grant will be used are added. This list, required per Texas Tax Code Section 351.108, should include each scheduled activity, program, or event as well as date and exact location address that: (1) is directly funded by the tax or has its administrative costs funded in whole or in part by the tax; and (2) is directly enhancing and promoting tourism and the convention and hotel industry. The form provided by Houston Arts Alliance must be received prior to the issuance grant agreement and the first payment. Additionally, grantees are asked to notify Houston Arts Alliance of changes to the programs and activities proposed in the application.
- **FINAL REPORT** is required after the close of the grant term. The Final Report includes information and documentation on completed activities, income and expenses for the grant. Documentation for how grant funds were used must include copies of every invoice/receipt and check written for grant expenses paid for with Houston Arts Alliance funds. Every check copy and receipt or invoice copy provided Houston Arts Alliance should be dated during the grant term (between July 1, 2009 and June 30, 2010). See specifics for each Grant category.

For the Final Report, activity or project documentation can include sample items such as copies of ads placed in newspapers, programs or fliers that include Houston Arts Alliance and City of Houston legend or credit line as stated in the grant agreement. Final Reports must be prepared so that the financial and activity documentation is easy to review. Incomplete and poorly organized Final Reports may be returned to the grantee for additional work and will delay final payment. The final quarter grant check will be processed only after the Final Report is approved with required documentation. Depending upon the volume of reports, the accuracy of the submitted documents and prompt replies to any inquiries in the process, the process may take from 30 days to several months to complete. **Grantees who fail to file the required report within 90 days of deadline automatically forfeit final payment and jeopardize future awards. Payments on future pending grants will be penalized by forfeiture of each quarterly payment for each quarter delay in filing Final Report. Failure to file Final Report on previously due grants prior to December 31, 2010 will prevent an organization for applying for funding in next fiscal year.**

## **CREDITING SUPPORT OF THE CITY OF HOUSTON AND HOUSTON ARTS ALLIANCE**

Grantees are required to acknowledge the support of the City of Houston and Houston Arts Alliance (HAA) with the use of logos and a credit line. Generally, Houston Arts Alliance asks that the organization credit the City and HAA providing the same value of recognition to the City and HAA as provided to other funders at a similar level. Houston Arts Alliance and City of Houston logos may be found on the HAA website, under Managing Your Grant. Generally, the credit line required is: *“This project (or organization) is funded by grants from the City of Houston through Houston Arts Alliance,”* unless otherwise stated in Houston Arts Alliance Grant Agreement.

### **Insurance**

Grantees that are awarded over \$30,000 in funding from the City of Houston from its various grant programs must provide Houston Arts Alliance with proof of the following types of insurance:

1. Worker’s Compensation (statutory amounts);
2. Employer’s Liability (\$500,000, \$500,000, \$500,000);
3. Commercial General Liability including Contractual Liability to cover Houston Arts Alliance and the City for the Indemnification (\$500,000/\$1,000,000);
4. Automobile Liability, where appropriate (\$500,000/\$1,000,000); and
5. Copyright Protection (\$500,000/\$1,000,000)—where appropriate.

All insurance must be on an occurrence basis. All grantees must include Houston Arts Alliance and the City of Houston as additional insureds and provide Houston Arts Alliance with Certificates of Insurance. (Do not send Certificates to City, but to HAA.)

Grantees receiving less than \$30,000 are required to maintain the necessary insurance to conduct their business but do not have to provide proof of insurance to Houston Arts Alliance.

Houston Arts Alliance reserves the right to make changes in the grant program policies, schedule or guidelines. All changes will be deemed ‘published’ once posted on Houston Arts Alliance’s website at [www.haatx.com](http://www.haatx.com).

# GENERAL OPERATING SUPPORT & GENERAL OPERATING SUPPORT EXPANSION

## Deadlines

Online Application **Friday, March 5, 2010 7:00 P.M.**

Required Support Materials **Wednesday, March 10, 2010 5:30 p.m.**  
Important: This is not a postmark deadline. Required Support Materials must be received at Houston Arts Alliance's office no later than 5:30 P.M. on March 10, 2010.

## Purpose

This category is open only to nonprofit arts and cultural 501 (c) 3 public charity organizations with prior two year average cash revenues in excess of \$50,000 as determined by their IRS 990s. Organizations must have been in existence for minimum of three years prior to application date and have completed two previous HAA Arts Project grants.

The General Operating Support category provides financial support to aid arts and cultural organizations to present or produce arts and cultural programs that serve to: (1) establish a nationally recognized cultural environment that attracts visitors and tourists to the arts presentations and exhibitions to City of Houston; and (2) meet the needs of the culturally diverse residents and visitors of Houston.

The program's goal is to develop and sustain excellence in the arts by awarding funds to advance the artistic, administrative and organizational capacity of small, midsize and large arts/cultural organizations.

The objectives of the General Operating Support category are:

- To provide a consistent funding mechanism for arts and cultural organizations of excellence in the City of Houston.
- To support arts and cultural activities that implement the intended use of Hotel Occupancy Tax funds, as described in Sections 351.101(a)(4-5) and 351.101(b) of the Texas Tax Code.
- To promote cultural tourism by supporting special efforts to attract visitors to include arts activities in their Houston itineraries.
- To advance the artistic, administrative and organizational capacity of arts/cultural organizations.
- To ensure access to the arts for all residents and visitors.
- To provide supplementary financial support to multicultural arts organizations in order to fortify the cultural diversity of arts programming available to visitors and area audiences.
- To stimulate economic and community development through the arts.

Arts/cultural organizations that operate year-round will generally offer a wide variety of programs. A large number of programs are targeted to the general public and are thus attractive to tourists or serve to advance Houston's competitiveness as a cultural tourism destination; a smaller number of programs are targeted to specific populations that are not tourism-related. In considering whether to apply or not for a General Operating Support/General Operating Support Expansion grant, please take into account that the application should provide a broad-view of the organization's year-round programs and highlight those which meet the requirements of the revenue source for the grants (Hotel Occupancy Tax). If the majority of an organization's primary activities do not meet the Hotel Occupancy Tax (HOT) requirements, we recommend the organization to apply instead for an Arts Project Grant for those activities that will meet

the HOT requirements and serve the tourism, convention and hotel industry. HAA reserves the right to move an organization from General Operating support to Arts Project support, if it deems its project to be limited in scope or not meet the Hotel Occupancy Tax requirements.

Funded organizations are not restricted in the types of programs they can offer or include in their application; the only restriction is in how Houston Arts Alliance grant funds are utilized. Since the grants have to be matched with other revenues (and generally most applicants exceed the 1:1 match), it is our experience that most grantees have no difficulty identifying expenses related to programs that meet the requirements of the Hotel Occupancy Tax.

## Types of Support

Houston Arts Alliance offers two types of general operating grants that are open strictly to arts/cultural organizations physically based within the city limits of Houston:

- **General Operating Support:** provides operating support for arts and cultural organizations that present regular seasons of arts or cultural programs that serve residents, visitors and tourists to Houston. While the grants are awarded for operating support, grantees are required to spend the grant funds only for the allowed purposes of the Hotel Occupancy Tax.
- **General Operating Support Expansion:** provides operating support for multicultural arts organizations as defined below that present a regular season of arts or cultural programs that serve residents, visitors and tourists to Houston. While the grants are awarded for operating support, grantees are required to spend the grant funds only for the allowed purposes of the Hotel Occupancy Tax.

**Priorities for funds:** include payments to artists and artist related costs; marketing & promotion of the funded activities; production/exhibition related costs

## Eligible Organizations

Only arts/cultural and multicultural arts organizations are eligible for General Operating Support and General Operating Support Expansion grants, provided that they meet the following requirements:

1. The organization's **primary mission**, as described in its mission statement and approved by its board of directors and reflected in its annual scope of programs, **is the production or presentation of a regular season of arts and cultural programming through the year.**
2. The organization has current tax-exempt status under Section 501(c)(3) (or the equivalent) of the Internal Revenue Service as a public charity. The tax-exempt status must have been granted by the IRS at least three years prior to the grant application deadline. Organizations with lapsed IRS 501(c)(3) status are not eligible to apply.
3. The organization has produced or presented through the year, a season of arts or cultural programming open to the general public for at least one year prior to the grant application deadline.
4. The organization is physically based within the incorporated limits of the City of Houston.
5. The organization is governed by a local board of directors that meets regularly.
6. The majority of the organization's programs and events are advertised and open to the general public.
7. The majority of the organization's programs and events attract visitors and tourists to Houston.
8. The organization has successfully managed at least two Houston Arts Alliance Organization Arts Project grants.
9. The organization does not have any outstanding Final Reports due to Houston Arts Alliance including General Operating Support, General Operating Support Expansion, Arts Project, Touring & Neighborhood Arts Project, City's Initiative (Mayor's) Grant Program, and Intensive and Stabilization Programs and any pre-FY09 grant programs.

**Definition of Arts/Cultural Organization:** For purposes of Houston Arts Alliance General Operating Support category, an arts/cultural organization is defined as a non-profit cultural organization whose primary mission, as described in its mission statement and approved by its board of directors, is the production or presentation of a regular season (year-round) of arts and cultural programming. The chief activity of the organization is the presentation or production of ongoing arts/cultural programs for the public at large, including visitors and tourists. Such organizations include but are not limited to performing arts companies, visual arts organizations, literary organizations, galleries, art centers, artists' associations and arts service organizations.

**Definition of Multicultural Arts Organization:** For the General Operating Support Expansion component, a multicultural arts organization is an arts organization that is deeply rooted in and reflective of the culture of a minority, inner-city, tribal, or disabled community; is primarily devoted to providing art to their unique community; presents a regular season of art or cultural programs that also attracts visitors and tourists to Houston; and has a local board of directors with a majority of members representative of the minority, inner-city, tribal or disabled community served. Applicants for this category must be reviewed by HAA to be accepted into the category. All FY10 Expansion organizations will be reviewed for renewal during FY11 and subject to review every 5 years.

**First Time and Former Applicants:** First-time applicant organizations and former applicants who have not been approved for funding or have not applied in the past two years are required to apply for an Arts Project Grant and demonstrate their ability to manage a Houston Arts Alliance grant successfully before applying for a General Operating Support grant in subsequent years. A 'first-time applicant' is an organization that has not received a peer panel-reviewed General Operating or organization Arts Project grant through Houston Arts Alliance in the past three years.

## **Ineligible Organizations**

Nonprofit organizations whose primary mission is other than presenting or producing arts and cultural programs are not eligible for the General Operating Support category. This includes social service agencies, units of local government, community organizations, university /college or educational departments or agencies and other nonprofits. Also, ineligible are organizations that are less than three years old or that have not been funded through the Grants for Organizations peer panel process by Houston Arts Alliance in the past three years. These organizations may be eligible for Arts Project Grants; please refer to that section of the guidelines for additional information.

Nonprofit organizations (arts/cultural and others) whose physical administrative offices (or main place of business) are outside of the City of Houston are not eligible for Hotel Occupancy Tax support from Houston Arts Alliance.

Organizations that receive Hotel Occupancy Tax funds through the group agreements with the Houston Museum District or Theatre District Association are not eligible to apply for additional General Operating Support grants from Houston Arts Alliance.

Arts/cultural organizations with activities that have no measurable impact on the promotion of tourism and the convention and hotel industry are not eligible to receive Hotel Occupancy Tax funded-general operating support grants. Grant funds may not be used for activities that take place outside of the City of Houston or that do not comply with the intended use of Hotel Occupancy Tax funds as defined in state law.

## **Two-Year Continuation Process**

Houston Arts Alliance Two –Year Continuation Process is for arts organizations who receive operational support. The intent of the two-year continuation cycle is to reduce the paperwork burden on applicants, while maintaining the accountability necessary in the disbursement of public funds. Houston Arts Alliance will convene the peer review panels on an alternate-year basis, streamlining the work of the volunteers who serve on the panels. Please note that this is a two-year continuation process, not a two-year funding process, as Houston Arts Alliance receives its funding on an annual basis and cannot guarantee multi-year funding.

In the year when an arts/cultural or multicultural arts organization does not apply through the panel review process, the organization's previous year's panel score will be used in determining the size of the grant award. The organization is required to submit certain documentation for the grant process by the appropriate deadline, but will not complete the full

application or undergo the panel review process. The grant amount will be calculated using the prior year's score, the maximum eligible request amount (MER), the amount of funds available to award, and the number and quality of applications. Funding level is not guaranteed from year to year as these variables and available funding changes from year to year.

**Organizations submitting the full application for FY2011 online due by March 5, 2010**

- **Dance**
- **Literary Arts**
- **Music**

For organizations in the above listed disciplines, the panel scores based on the application submitted on or by March 5, 2010 will be used to calculate the funding for FY2011.

**Organizations Submitting the Continuation Form for FY2011 is due March 10, 2010.**

- **Architecture/Design/Historic Preservation & Museums**
- **Multi-disciplinary and Service**
- **Theatre and Musical Theatre**
- **Visual Arts, Media and Crafts**

Organizations that submitted the full application and were awarded grants for FY2010 must submit the continuation form; these groups will not submit a full online application and will not undergo panel review for FY11, unless otherwise informed by HAA Grants staff.

Rather, Houston Arts Alliance will use the FY10 panel score to allocate the grant funds. Organizations not required to apply in February 2010 must submit the continuation form to continue receiving support from Houston Arts Alliance by March 10, 2010. Failure to submit this form by deadline will automatically forfeit organization's FY2011 grant award. HAA is not responsible for organization not knowing deadlines or application process as these are published on HAA website.

Eligible Architecture/Design/Historic Preservation & Museums, Multi-disciplinary and Service, Theatre and Musical Theatre, Visual Arts, Media and Crafts organizations that did not apply or were not awarded operating support grants for FY2010 are required to submit an application online for FY11. An organization in one of those disciplines will be evaluated by a General discipline panel. These groups, if funded, will have to submit a full application for the FY2012 grant period in their appropriate discipline before they can be part of the two-year continuation process.

Although organizations may submit in the category of their choice, Houston Arts Alliance reserves the right to designate the discipline panel it feels best suits the mission and programming of an organization and the scope of the peer review panel.

## **Maximum Eligible Request**

An organization's maximum eligible request (M.E.R.) is a percent of the average allowable cash revenues as determined from their IRS 990/990EZ Form (or internal financial report) for the two most recently completed fiscal years (in most cases fiscal years 2008 and 2009). All organizations are required to file a 990 report which must be available on [www.guidestar.org](http://www.guidestar.org) no later than May 20, 2010. The IRS form 990 for 2008 and 2009 determines the accuracy of Maximum Eligible Request (M.E.R.). If HAA can not verify your 990's on Guidestar.org this could have an impact on the accuracy of your award. (See page 8 of Guidelines). Do Not Submit copies of your 990s as HAA will verify through Guidestar.

Applicants must file a MER Worksheet as part of their online application to determine their MER for their operating grant application. The worksheet form can be downloaded from Houston Arts Alliance web site ([www.haatx.com](http://www.haatx.com).)

In reporting revenues for purposes of figuring the Maximum Eligible Request, organizations **cannot include** revenues that are:

- in-kind,
- for debt reduction,
- for capital acquisitions,
- from endowment or capital campaigns,
- from for profit school(s) or academies,
- from the Theater or Museum District, Miller Theatre Advisory Board, Parks Board or other City of Houston sources,
- from Houston Arts Alliance (all grant categories),
- revenue from one-time large sources of income (such as bequests or one-time special grants that are greater than 10% of total revenue), or
- earned revenue from touring activities outside of Texas.

The financial documentation, submitted as part of the Required Support Materials, must tie to the financial information provided in the MER Worksheet. After reviewing the financial documentation submitted and the MER Worksheet, Houston Arts Alliance may request additional information from applicants in order to clarify data or to provide needed details.

## **Restrictions on Funding**

Arts/cultural organizations based in the City of Houston are eligible for funds from the City of Houston Hotel Occupancy Tax (if their programs meet Hotel Occupancy Tax statutory requirements). If the organization believes that the portion of their program expenses that meets the Hotel Occupancy Tax statutory requirements represents less than their Maximum Eligible Request, the organization should consult Grants staff for guidance.

## **Matching Funds Requirement**

General Operating Support and General Operating Support Expansion grants must be matched by an equal amount of cash from other sources (each dollar of the grant request/award must be matched with one dollar from another source). The matching funds must be collected during the period of the grant term and documented in the final report.

## **Size of Grant Awards**

Because of budget limitations, Houston Arts Alliance rarely fully funds any grant request. Most grants awarded in the General Operating Support and General Operating Support Expansion range between \$2,000 and \$40,000. The maximum amount awarded for a General Operating Support or General Operating Support Expansion grant is \$100,000.00.

## **Funding Criteria**

All General Operating Support and General Operating Support Expansion applications are reviewed using the following criteria weighted on a rating scale:

- Artistic/Cultural Merit = 40 percent
- Administrative Ability = 20 percent
- Audience Development/Community Outreach = 20 percent
- Cultural Tourism Impact = 20 percent

Applicants should address specific criteria when answering the narrative questions in the online grant application. The criteria are the grant review panelists' guide in rating the grant applications. The criteria, which have been developed over a period of time and with input from Houston Arts Alliance constituents, represent the qualities that are considered important for a well-run arts/cultural organization.

The criteria are intended to set standards; therefore, not every applicant will meet the criteria in exactly the same way. The size, mission and other characteristics of an organization are relevant to an organization's evaluation.

### **Artistic/Cultural Merit (40%)**

**For arts organizations** (dance, literary arts, media, music, theater, multidisciplinary, visual arts, design): Artistic merit refers to the achievement of a high level of aesthetic fulfillment according to the recognized standards of the artistic discipline under consideration. Artistic merit refers to the artistic quality of the activities or season proposed as well as the quality of the applicant's artistic efforts or presentations in the past in relation to its available funding. All artistic disciplines have developed clearly recognized standards applicable to differing levels of longevity, experience or training.

**For cultural organizations and arts service organizations** (historic preservation, folklife, traditional art forms): Cultural merit refers to the achievement of a high level of programmatic fulfillment according to the recognized standards of the discipline under consideration. For arts service organizations, cultural merit refers to the quality of the services or work done by organizations that do not fit the model of traditional arts organizations. Cultural merit refers to the quality of the activities or season proposed as well as the quality of the applicant's cultural efforts or presentations in the past in relation to its available funding.

Panelists' aesthetic judgment and expertise in the particular or related disciplines qualify them to collectively judge artistic/cultural merit.

Key elements in rating the Artistic/Cultural merit of an application include:

- Activities that are of high artistic quality or exemplary of the organization's discipline
- Quality of the artists or experts involved in performances, works, and/or activities
- Involvement of artists or experts who are knowledgeable of their discipline
- Innovative and creative programming and artist selection
- Artistic or curatorial staff that shows vision and leadership
- Effective use of artistic resources of the community
- Quality of sample materials demonstrating artistic work

Scores given for artistic/cultural merit are influenced by: the description of artistic/cultural merit provided by the applicant in the application narrative; the descriptions, resumes and biographies of artists and artistic/curatorial staff; descriptions of the proposed season of activities; support materials such as printed materials, videos/CDs & DVDs, etc.; and panelists' first hand experience of the organization's work. Organizations are encouraged to provide the highest quality of production materials available to assist the panels in their review.

### **Administrative Ability (20%)**

This criterion refers to the applicant's organizational stability, effective board leadership and staff administration, ability to plan and implement projects and to create policy and procedures, and demonstrated ability to be fiscally responsible and accountable. Other considerations include demonstrated success in properly administering grant funds and documenting projects according to the ethical and legal requirements of contracts with funding organizations and project personnel.

Key elements in rating the Administrative Ability of an application include:

- A continuing history of organizational stability and vision
- The organization's capacity for providing short range and/or long range planning
- Financial stability; balance of earned and contributed revenue
- Accurate record keeping and regular preparation of financial reports
- Diversification of its funding base as evidenced by efforts to secure financial support from the private sector (individuals, foundations, corporations) as well as the public sector
- Evidence of board/staff interaction as demonstrated through working committees
- Evidence of leadership and experience of administrative staff
- A board of directors, representative of the community, that meets at least quarterly and sets policies for the organization
- Ability to deliver services effectively
- The overall quality of the application, including attention to spelling, grammar and clarity
- Effective management of Houston Arts Alliance grant(s) including timely submission of reports and timely completion of grants, events, programs and activities

### **Audience Development and Community Outreach (20%)**

This criterion refers to the applicant's demonstrated interest in extending its programs and presentations to new and diverse audiences, in involving culturally diverse individuals in its organization, and in collaborating with other organizations.

The evaluation of these criteria is of crucial importance because they express a basic goal: The purpose of public support of the arts is not solely to ensure survival of these important disciplines or simply to acknowledge their cultural significance, but also to encourage organizations to develop future audiences or expand the current base of their audience by reaching out to residents of all ages and ethnicities and visitors to the Greater Houston area.

Key elements in rating the Audience Development/Community Outreach of an application may include any of the following::

- Furthering an understanding of and generating interest in the organization's particular art form or discipline
- Efforts to reach and serve visitors and tourists
- Efforts to involve individuals of different backgrounds at the artistic, technical, administrative and board levels
- Outreach efforts to develop future audiences, to reach and serve new, special and/or diverse audiences
- Collaborating with other organizations
- Providing programming in venues and through methods that make the programming accessible to people with disabilities

### **Cultural Tourism Impact (20%)**

The nonprofit arts industry is an important segment of the Houston area economy. Not only do arts/cultural organizations add revenues to the economy and contribute to the quality of life, but they also contribute to the vitality of tourism and the convention and hotel industry. Organizations that receive grants from Houston Arts Alliance are vital to building the cultural environment of the region and making Houston a more attractive place to visit. Because our grants are funded with Hotel Occupancy Tax, it is important for all applicants to clearly articulate how they propose to meet these criteria in the application.

Key elements in rating the Cultural Tourism Impact of an application include:

- Marketing and public relations efforts to promote activities and programming that may draw tourists and visitors to the region or is directed at conventions or visitors in the City. Visitors and tourists are defined as coming from at least fifty miles outside of Houston. Daytime student audiences are not considered tourists.
- Efforts to increase Houston's competitiveness as a cultural tourism destination.
- Programming that contributes to creating a regional identity/image of quality and creativity to attract and retain residents and visitors to Houston.

## Peer Review Panels by Discipline

The General Operating Support and General Operating Support Expansion grant review panels are organized by artistic discipline: dance, literature, music, theatre, visual/media and craft arts, design/historic preservation, multi-discipline and service.

### The following peer review panels will convene in 2010 for FY2011 grant allocations:

- Dance
- Literary
- Music
- **General:** A General panel will convene to review the organizations whose discipline is not listed above or either the organization did not apply or was not awarded a grant in FY10 (when its discipline-specific panel met for the two-year cycle).

**An organization's application should stand on its own.** Applications and support materials should be prepared and submitted so that peer review panelists will have at hand all the information they will need to make informed decisions about the grant proposal. Houston Arts Alliance instituted a change in the panel process in 2005 and now requires an informed representative(s) attend to answer questions from the panel during the organization's panel review. (See page 9 of Guidelines). **As organizations must have a representative present during their review, check the HAA website for peer panel dates and times.**

## Required Support Materials for General Operating Support/Expansion

In addition to filing the grant application on the electronic grant application system, each applicant must submit the Required Support Materials to Houston Arts Alliance by 5:30 p.m. on **March 10, 2010**. **This is not a postmarked deadline; items not received by 5:30 P.M. will not be accepted.**

Deliver Required Support Materials by the deadline to:

Houston Arts Alliance  
Grant Applications  
3201 Allen Parkway, Suite 250  
Houston, TX 77019-1800

For **General Operating Support and General Operating Expansion** full applications, the following are Required Support Materials due by March 10, 2010:

In instances when three sets or copies of any one support material is requested, two copies will be sent to the panelists assigned to the application to facilitate their review. Failure to submit three copies will limit the panel's ability to review the application. *When submitting items please correlate in threes. Please do not assume we have these items on file.*

1. Three copies of short biographies or résumés of the principal artists of the application. Résumés are limited to one page each and the maximum number of pages for all combined résumés/bios is five pages. Cultural organizations should submit bios or résumés for the curators/experts involved in the proposed programs.
2. Three copies of the list of the current season (FY10) of arts or cultural performances, exhibitions, activities or programs that were/are open to the public with the date, title of the activity, and venue/location.
3. Three copies of a one-page maximum history of the applicant organization.
4. Three sets of artistic support materials appropriate to the artistic discipline of the project. Examples of artistic support materials include videos, CDs, DVDs, audiocassettes, photographs, digital images (not slides), books, programs, reviews, educational or promotional materials, press clippings, etc. Please see the section below for more details on the required artistic materials. Failure to submit three copies may limit the panel's ability to evaluate your organization. You are advised to check copies of electronic materials prior to submission.
5. Three copies of a brief description of the audio or video materials submitted. Include date of performance, location, title and/or performers.
6. One original signed Assurances Page.

### Financial Documentation

**FY08 & FY09 990s must be filed on the web database used by the IRS known as Guidestar.org, no later than May 20, 2010. Organization's IRS 990s will be verified through Guidestar. If the FY08 & FY09 IRS 990 are not available, then Houston Arts Alliance will temporarily base Maximum Eligible Request on the two most previous verifiable financial reports. (These can be previous 990 reports or Internal Annual Financial reports signed by Board Treasurer). No payments can be made until both the FY08 and FY09 IRS 990 are on file with Guidestar.org. To speed up the process, organizations can self-submit their 990s on Guidestar.org. Please visit Guidestar.org for instructions on creating an account and posting your 990's. To post the 990's your organization may be charged a nominal fee.**

### Artistic Support Materials

All applicants are required to submit materials that evidence the artistic merit of their programming. Organizations are encouraged to submit recent materials (produced within the past two years) and to be selective.

1. **Performing Arts Disciplines (Dance, Music, Theater and Musical Theater):** Please submit three, CDs or DVDs, with a clear indication of where you would like the panel to review. Panelists will usually review only 3–5 minutes in total, so be very selective. Organizations are encouraged to create a sampler, when possible that demonstrates the quality and variety of the organization’s work. As panelists may not be familiar with your organization, the quality of the materials you submit may reflect upon the quality of your programs. Attach to the material a brief description of the artistic example. Also submit printed materials such as programs, flyers, press clippings, etc. that demonstrate the organization’s artistic product. (3 copies of materials are required)
2. **Visual Arts/Media/Crafts/Architecture/Historic Preservation:** Please submit three samples of digital images (up to 10) or video on DVD or CD. The Panel will usually review only 3–5 minutes in total, so be very selective. Attach to the material a brief description of the artistic example. Also submit printed materials such as programs, flyers, press clippings, etc. that demonstrate the organization’s artistic/cultural product. As panelists may not be familiar with your organization, the quality of the materials you submit may reflect upon the quality of your programs (3 copies of materials are required)
3. **Humanities & Literary Arts:** Please submit three sets of printed or digital materials that evidence your organization’s activities (journals, articles, etc.) or any other type of materials produced by your organization. Also submit printed materials such as programs, flyers, press clippings, etc. that demonstrate the organization’s artistic product. (3 copies of materials are required)
4. **Multi-disciplinary:** Please submit three sets of an appropriate combination of artistic support materials as well as printed materials that represent the artistic product of your organization. Please submit three, CDs, or DVDs, or audiocassettes, cued to the section that you would like the panel to review. Panelists will usually review only 3–5 minutes in total, so be very selective. Organizations are encouraged to create a sampler, when possible that demonstrates the quality and variety of the organization’s work. As panelists may not be familiar with your organization, the quality of the materials you submit may reflect upon the quality of your programs. (3 copies of materials are required)

## **Arts/Cultural Organizations Not Required to Submit Full Application in February 2010**

Arts/cultural organizations that received Houston Arts Alliance FY10 operating support grants (GOS or GOSE) in the disciplines of Architecture/Design/Historic Preservation & Museums, Multi-disciplinary and Service, Theatre and Musical Theatre, Visual Arts, and Media and Crafts are not required to submit the full application for peer review panels for 2011(unless requested by HAA Grants staff), these organizations must submit the following materials by March 10, 2010 (delivered by 5:30 P.M.):

1. **A completed 2nd Year Grant Continuation Form.**
2. **Original signed Assurances Page.**
3. **A completed MER Worksheet.**
4. **Internal Financials for FY08 & FY09, only if 990s not available on Guidestar**

Please deliver Required Materials by the deadline to:

Houston Arts Alliance  
RE: Continuation Grant Applications  
3201 Allen Parkway, Suite 250  
Houston, TX 77019-1800

# Arts Project Grants

## Deadlines

Online Application: **Friday, March 5, 2010 7:00 P.M.**

Required Support Materials: **Wednesday, March 10, 2010 5:30 p.m.**  
Important: This is not a postmark deadline. Required Support Materials must be received at Houston Arts Alliance's office no later than 5:30 P.M.

## Purpose

**This category is also used to fund arts organizations with two year average cash revenues of less than \$50,000 as demonstrated by their IRS 990 reports it is also open to university/college and educational agencies and departments, and non-arts nonprofits.**

The purpose of the Arts Project Grants category is to assist nonprofit organizations in producing and presenting arts and cultural projects that are open to the general public and that contribute to making Houston a more attractive cultural destination.

For purposes of this category, the proposed project must have a distinct focus, timeline and/or date and budget. The project must be of clear benefit and be accessible to the general public and meet the requirements of the Hotel Occupancy Tax Code. Types of eligible projects include one time or series of public performances or exhibitions; creation of new work; artists' residencies; lecture/demonstrations or workshops; and services to the field that meet the City of Houston Hotel Occupancy Tax requirements as previously described. Project grants are not intended to provide general operating or year-round support. A series of events or festival (defined as multiple performances or events in one day or longer that share a common theme or purpose) may qualify. (For example, a one week arts festival or a particular series of similar events over a specified time).

**Priorities for funds:** include payments to artists and artist related costs; marketing & promotion of the funded activities; production/exhibition related costs

Only one project application per eligible organization will be accepted for Arts Project Grants.

## Eligible Organizations

Arts Project Grants are open to university/college and educational agencies and departments, and non-arts nonprofits including community organizations, civic organizations, social service and other nonprofit organizations that produce or present arts and cultural activities that are open to the general public and are eligible for funding through the Hotel Occupancy Tax. Arts Project Grants are also available to arts or cultural organizations whose primary activities do not meet the requirements of the Hotel Occupancy Tax fund, but who have special projects within the year that may meet the Hotel Occupancy Tax statutory requirements.

Project support is not designed to support any one organization's entire annual expenses, but rather a specific event, series of events or component of a season. Eligible activities include, but are not limited to visual arts exhibitions, performing arts presentations, festivals, and other public programs that make Houston an attractive cultural environment for visitors and residents alike. Organizations whose primary mission and programs are not arts related are advised to apply for Arts Project support

Funded activities should, in accordance with the Hotel Occupancy Tax Code, enhance and promote tourism and the convention and hotel industry. For more information about the Hotel Occupancy Tax, please see the "Funding Sources" section of the guidelines.

## Requirements

First time applicants and arts/cultural and multicultural organizations that have not received a Houston Arts Alliance grant in the past three years should apply in this category (instead of the General Operating Support category).

Organizations applying for Arts Project Grants must meet the following requirements:

1. The organization has current tax-exempt status under Section 501(c) (3) of the Internal Revenue Service (or the equivalent) as a public charity for one year prior to the application deadline.
2. The organization has produced or presented arts or cultural programming during the 12 months prior to the grant application deadline.
3. The organization is physically based and offers events primarily in the City of Houston.
4. The organization is governed by a local board of directors that meets regularly.
5. The organization has a track-record of providing arts/cultural programs and events that are advertised and open to the public.
6. The organization does not have any outstanding Final Reports due to Houston Arts Alliance including General Operating Support, General Operating Support Expansion, Arts Project, Touring and Neighborhood Arts Projects, City's Initiative (Mayor's) Grant Program and Intensive and Stabilization Programs and any pre-FY09 grant programs.

## Ineligible Organizations

Any arts/cultural organizations and multicultural organizations that meet the criteria are eligible for this category, unless their regular programming does not meet the Hotel Occupancy Tax Requirements. Arts/cultural organizations that are not first-time applicants and whose budgets meet the minimum requirements may choose to apply in the General Operating Support/General Operating Support Expansion category.

Organizations who are based outside the City of Houston or that receive Hotel Occupancy Tax funds through the group agreements with the Houston Museum District or Theatre District Association are not eligible to apply for Arts Project Grants from Houston Arts Alliance.

Organizations may not use Arts Project Grants to support activities that are not consistent with the intent of the Hotel Occupancy Tax, that do not benefit the Houston area, or programs that take place outside of City of Houston. Activities funded or included in any other Houston Arts Alliance grant application are not eligible for funding. Activities funded by Miller Theatre Advisory Board, Theatre District or Museum District or other Hotel Occupancy Tax sources are not eligible for funding in this category.

This category does not provide non-project administrative or general operating support. Projects that are not conceived and directed by the applicant organization are generally not competitive in the funding process. (A list of other items ineligible for support appears on [pages 10–11](#)).

## Multiple Applications

Only one application is accepted from eligible organization in this category.

Eligible Houston arts/cultural organizations may participate in projects both as an applicant and as the featured artist/arts group of another applicant. However, no more than two applications may feature the same arts organization (assuming that one is by the organization itself and the other one by another organization that wishes to feature the arts organization as a guest artist and it is clear that it is the applicant organization that is leading the project). If more than two eligible

applications are submitted in any one cycle featuring the same artist or arts group, Houston Arts Alliance reserves the right to determine which application will be funded. Applications from more than one organization for the same project cannot be accepted.

This category is not intended to support projects by individual artists. Individual artists may appear as the featured artist of an eligible project of the applicant organization. However, no more than two applications may feature the same individual artist. Individual artists who are affiliated with an applicant organization (as artistic director or a principal artistic staff) may only appear as guest artists in one other application. The second project involving the guest artist should not be for an activity of the guest artist's own organization. We do not accept fiscal agent applications or umbrella organization applications.

## **Amount of Request**

The maximum request is 50% of a project's actual expenses up to \$10,000, not to exceed 25% of the organization's average of previous two year's cash revenues as verified by IRS 990s on Guidestar. Most grants awarded in the Arts Project Grant program range between \$2,000 and \$5,000. (See page 8)

## **Matching Funds Requirement**

The amount of the Arts Project Grant request/award must be matched dollar for dollar from cash expenses other than Houston Arts Alliance or City of Houston Hotel Occupancy Tax. Generally, matching funds from other City of Houston sources will not be accepted. The matching funds must be collected (not just pledged or awarded) during the term of the grant.

## **Peer Review Panel**

Arts Project Grant applications are reviewed by appropriate panels of arts professionals, artists, academics and community and corporate volunteers who are knowledgeable of arts projects. The Arts Project Panel meetings will be open to the public. Organizations wishing to observe the panel meeting should contact Houston Arts Alliance to reserve a space.

## **Funding Criteria**

All Arts Project Grant applications are reviewed using the following criteria weighted on a rating scale:

- Artistic Merit = 40 percent
- Administrative Ability = 20 percent
- Audience Development & Community Outreach= 20 percent
- Cultural Tourism Impact = 20 percent

These criteria are the panelists' guide in rating the grant applications. The criteria represent the qualities that are considered important for a successful arts project. The criteria are intended to set standards; therefore, not every applicant will meet the criteria in exactly the same way. The size, mission and other characteristics of an organization are relevant to an organization's evaluation.

Applicants should address specific criteria when answering the narrative questions in the online grant application.

### **Artistic Merit (40%)**

1. High artistic quality of the proposed project.
2. Innovation and creativity in programming and artist selection.
3. Demonstrated ability of artists involved.

4. Demonstrated ability of the applicant to produce quality arts programming.

### **Organization's Administrative Ability (20%)**

1. Evidence of fiscal responsibility and administrative competence.
2. Match of at least dollar for dollar in cash from other sources.
3. Diversity and balance of funding sources as evidence in both earned and unearned sources from both private and public sector.
4. Application is clear and concise; budget projections are realistic and accurate.
5. Capacity to meet proposed project's objectives.
6. Successful completion and reporting for programming previously funded by Houston Arts Alliance (when applicable).

### **Audience Development and Community Outreach (20%)**

This criterion refers to the applicant's demonstrated interest in extending its programs and presentations to new and diverse audiences, in involving culturally diverse individuals in its organization, and in collaborating with other organizations.

The evaluation of these criteria is of crucial importance because they express a basic goal: The purpose of public support of the arts is not solely to ensure survival of these important disciplines or simply to acknowledge their cultural significance, but also to encourage organizations to develop future audiences or expand the current base of their audience by reaching out to residents of all ages and ethnicities and visitors to the Greater Houston area.

Key elements in rating the Audience Development/Community Outreach of an application may include any of the following:

1. Furthering an understanding of and generating interest in the organization's particular art form or discipline
2. Efforts to reach and serve visitors and tourists
3. Efforts to involve individuals of different backgrounds at the artistic, technical, administrative and board levels
4. Outreach efforts to develop future audiences, to reach and serve new, special and/or diverse audiences
5. Collaborating with other organizations
6. Providing programming in venues and through methods that make the programming accessible to people with disabilities

### **Cultural Tourism Impact (20%)**

1. Marketing and public relations efforts to promote activities and programming that may draw tourists and visitors to the region or is directed at conventions or visitors in the City
2. Effective marketing and publicity plan, including efforts to attract tourists. Daytime student audiences are not considered tourists.
3. Programming that contributes to creating a regional identity/image of quality and creativity to attract and retain residents and visitors to Houston.

An organization's application should stand on its own. **Applications and support materials should be prepared and submitted so that peer review panels will have at hand all the information they will need to make informed decisions about the grant proposal. Houston Arts Alliance requires an informed representative(s) attend to answer questions from the panel during the organization's panel review. (See page 9 of Guidelines)**

## Required Support Materials for the Arts Project Grant

In addition to filing the grant application on the electronic grant application system, each applicant must submit the Required Support Materials to Houston Arts Alliance by **March 10, 2010**. Materials must be delivered to Houston Arts Alliance by 5:30 P.M. March 10, 2010. This is no longer a postmarked deadline; items not received by 5:30 P.M. will not be accepted.

In instances when three sets or copies of any one support material is requested, two copies will be sent to the panelists assigned to the application to facilitate their review. Failure to submit three copies will limit the panel's ability to review the application. *When submitting items please correlate in threes. Please do not assume we have these items on file.*

For Arts Project Grants, the following Required Support Materials are due by 5:30 P.M. on Wednesday, March 10, 2010 (**Not a postmarked deadline**).

1. Three copies of a list of the arts and/or cultural activities presented by the organization in the past 12 months.
2. Three copies of résumés or short biographies of the principal artists involved in the proposed project. Résumés restricted to one page each, not to exceed five pages total for all the résumés/bios submitted.
3. Three copies of artistic support materials appropriate to the artistic discipline of the project. Examples of artistic support materials include videos, CDs, DVDs, audiocassettes, photographs, digital images, books, programs, reviews, educational or promotional materials, press clippings, etc. Please see the section below for more details on the required artistic support materials. Failure to submit three copies may limit the panel's ability to evaluate your organization.
4. Three copies of a brief description of the audio or video materials submitted. Include date of performance, location, title and/or performers.
5. One signed copy of the Assurances Page.
6. First time applicants only—A copy of the Federal Tax Exempt Letter proving that the organization was determined to be a 501(C)(3) organization by the IRS by March 5, 2009.

### Financial Documentation

**FY08 & FY09 990s** must be filed on the web database used by the IRS known as [Guidestar.org](http://Guidestar.org), no later than **May 20, 2010**. Organization's IRS 990s will be verified through [Guidestar](http://Guidestar.org). If the FY08 & FY09 IRS 990s are not available, then Houston Arts Alliance will temporarily base Request on the two most previous verifiable financial reports. (These can be previous 990 reports or Internal Annual Financial reports signed by Board Treasurer). No payments can be made until both the FY08 and FY09 IRS 990s are on file with [Guidestar.org](http://Guidestar.org). To speed up the process, organizations can self-submit their 990s on [Guidestar.org](http://Guidestar.org). Please visit [Guidestar.org](http://Guidestar.org) for instructions on creating an account and posting your 990's. To post the 990's your organization may be charged a nominal fee.

### Artistic Support Materials

All applicants are required to submit materials that demonstrate the artistic merit of their programming. Organizations are encouraged to submit recent materials (produced within the past two years) and to be selective.

- **Performing Arts Disciplines (Dance, Music, Theater and Musical Theater):** Please submit three, CDs or DVDs, with a clear indication of where you would like the panel to review. Panelists will usually review only 3–5 minutes in total, so be very selective. Organizations are encouraged to create a sampler, when possible that demonstrates the quality and variety of the organization's work. As panelists may not be familiar with your organization, the quality of the materials you submit may reflect upon the quality of your programs. Attach to the material a brief description of the artistic example. Also submit printed materials such as programs, flyers, press clippings, etc. that demonstrate the organization's artistic product. (3 copies of materials are required)

- **Visual Arts/Media/Crafts/Architecture/Historic Preservation:** Please submit three samples of digital images (up to 10) or video on DVD or CD. The Panel will usually review only 3–5 minutes in total, so be very selective. Attach to the material a brief description of the artistic example. Also submit printed materials such as programs, flyers, press clippings, etc. that demonstrate the organization’s artistic/cultural product. As panelists may not be familiar with your organization, the quality of the materials you submit may reflect upon the quality of your programs (3 copies of materials are required)
- **Humanities & Literary Arts:** Please submit three copies of printed or digital materials that show evidence of your organization’s activities (journals, articles, etc.) or any other type of materials produced by your organization. Also submit printed materials such as programs, flyers, press clippings, etc. that demonstrate the organization’s artistic product. (3 copies of materials are required)
- **Multi-discipline:** Please submit three sets of an appropriate combination of artistic support materials as well as printed materials that represent the artistic product of your organization. Please submit three CDs, orDVD, or audiocassettes, cued to the section that you would like the panel to review. Panelists will usually review only 3–5 minutes in total, so be very selective. As panelists may not be familiar with your organization, the quality of the materials you submit may reflect upon the quality of your programs. (3 copies of materials are required)

## Helpful Tips

- Read the guidelines and the grant application instructions to familiarize yourself with the program requirements and criteria before beginning the application process.
- Plan your narrative following the questions and funding criteria. Plan your answers carefully to avoid repetition.
- Write to the funding criteria. Keep the funding criteria in front of you when preparing your proposal. Remember all applications are reviewed and scored based on how well the applicant meets the funding criteria.
- Don’t assume. The panelists who review your proposal may have no knowledge of your organization or its programming. Make sure you describe existing and proposed programs in detail. The application should stand on its own merits. You will be notified of panel review date and required to send a qualified representative(s) who can discuss the budget and program proposed.
- Avoid generalizations. Rather than stating, “We have operated a successful series of concerts for the last four years,” use numbers to prove your case. For example, “We have produced six plays with 10-performance runs for the last four years to audiences ranging from 75 to 100 for each performance.”
- Proofread. Before submitting your application, have at least one person proofread your application in addition to yourself. If the reader has questions, it is likely, the panel will as well. You are advised to create your narrative in Word to allow spell-check and grammar check and word count, then cut and paste into application. Applications that contain frequent typographical errors, poor grammar or misspelled words do not give a positive impression of the organization and rarely score well. If your narrative doesn’t fit into the allowed word limit, it is your responsibility to edit it to fit.
- Balance your budget for the projected grant period (projected income and expenses must balance). Previous years may show deficits or surpluses, since these are actual numbers and not projections.

**Please deliver Required Support Materials by the deadline to:**

Houston Arts Alliance  
 RE: Grant Applications  
 3201 Allen Parkway, Suite 250  
 Houston, TX 77019-1800