

San Francisco Girls Chorus

TEACHER NOTES

Learning Objectives

- Understand the different kinds of foundations and the role they may play in supporting musical arts organizations.
- Identify and evaluate the different factors that should be considered when researching a foundation on behalf of an arts organization.
- Describe the importance of a foundation's funding priorities and how those priorities may impact grant proposals.
- Articulate best practices for developing relationships with foundations and stewarding grant funding.
- Defend a course of action when artistic and financial opportunities are in conflict.

Topics For Discussion

• Foundation Research

- ♦ The first scenario tasks the reader with reviewing the SFGC foundation research document and identifying ways to improve the document. The essential question to be addressed is: what information does a not-for-profit arts organization need to determine if a foundation is a good match for a source of funding? Consider the relevant projects a foundation has supported most recently. In what ways can that clarify funding priorities? What kind of connections might a grants administrator seek in order to strengthen the potential match with a prospective grantmaker?
- ♦ Students may possess limited experience with—or not be aware of—the Form 990. The IRS requires that public charities and private foundations file a Form 990 each fiscal year. The form is used by the IRS to determine compliance with Internal Revenue Code and assess non-profit status. The 990 form includes information on an organization's mission, assets, receipts, expenditures, and officer compensation. Not-for-profit organizations are required to make their 990 forms available to the public. Survey a number of 990s with students to discover how to navigate these documents, particularly from the vantage point of a grants administrator.

- **Managing the Foundation Portfolio**

- ♦ As described in the case, a \$45,000 gap is expected in operating funds for the upcoming fiscal year because of a required off-year mandated by a foundation committed to the SFGC. How can off-year circumstances be managed by grants administrators? As suggested, have students identify an entirely new foundation prospect to fill the gap, using **Appendix 2**. What are the foundation's funding priorities? How can SFGC create a compelling proposal for support?

- **Conflicts in Fundraising**

- ♦ The final task challenges the reader to analyze the benefits and drawbacks of a new funding opportunity from the Main Street Foundation, which has provided consistent support to the SFGC for over ten years. What impact will the proposal have on SFGC programming—from the perspective of the festival performance and of the \$100,000 infusion of funding? What are ways that the SFGC administration team can manage the grant, if it decides to pursue the opportunity? How might the relationship between the SFGC and the Main Street Foundation change if the funding is not pursued? If the \$100,000 support ends up being a one-time donation, how does this affect long-term financial planning at the SFGC?

- **Foundation Funding Priorities**

- ♦ The case highlighted the funding priorities of the Walter & Elise Haas Fund, which involved neither artistry nor education directly, but rather a vibrant and equitable society more generally. How can an arts organization navigate a proposal for funding with general guidelines like this?
- ♦ Invite students to consider a project from their experience that could conceivably align with a focus similar to the Walter & Elise Haas Fund. How would the narrative be crafted to emphasize the mission, values and priorities of the Haas Fund?