



GENERAL OPERATING SUPPORT APPLICATION ONLINE PORTAL GUIDE

**Read this whole document before logging into the system!
We recommend you use Chrome or Firefox browsers.**

1. If your organization applied for a GFTA general operating support grant for FY20, you'll already have an account. Go to gfta.force.com to log-in.
2. If your organization does not already have an account, you'll need to create one. Please refer to our How-to guide, available at sfgfta.org/program-information/general-operating-support.
3. Make sure you download the **NARRATIVE** portion of the application. It is also available for download from both our agency site and the application site. **The completed NARRATIVE form will be a required attachment when you submit your completed application on the online portal.**
4. This ONLINE PORTAL GUIDE is for reference only, so that you can prepare your responses before logging into the system to enter your application.
5. We **strongly urge you** to have all your responses and attachments ready before you log-in to the system so that you can enter the information requested, attach all required documents, and submit your application in one session.
6. If you have any questions, please contact a GFTA staff member at (415) 554-6710 or gfta@sfgov.org. Business hours are 8:30 a.m. – 5 p.m. Monday – Friday. Please put "FY21 Application" in your subject line for emails; emails will be responded to the same day, or the next business day if sent after hours.

Assistance and support resources are available to all applicants, including application labs and workshops provided by [Intersection for the Arts](https://theintersection.org/get-skills/workshops/). <https://theintersection.org/get-skills/workshops/>

7. Please see our recommended workflow on the following page.

Here is a workflow that we suggest you follow for the smoothest possible application process:

1. Download this ONLINE PORTAL GUIDE and the NARRATIVE FORM from [our agency website](https://sfgfta.org/program-information/general-operating-support).
sfgfta.org/program-information/general-operating-support
2. Create a folder on your computer desktop (or wherever you prefer on your computer) for this year's GFTA application. Name it "FY21 GFTA Application".
3. Put this document and the Narrative Form in this folder.
4. As you gather your attachments, put them in this folder as well. You may want to create a sub-folder for attachments. Be sure to properly name each document: we suggest using the naming convention [Name of Item]_[Organization Name]. For example: boardlist_myartsorganization. We suggest putting the name of the item first so that you can more easily track what items you've gathered and what item to upload in the appropriate place on the checklist.
5. Answer all questions on this document. It may be easier to print a hardcopy and handwrite your responses (for numbers or text responses) and circle or highlight your responses for the picklist selections. You will enter these responses into the online system at Step 7.
6. Complete the Narrative Form. If different people will craft responses to different questions, provide them with the question and character counts (indicated on the form) so they know what to write, but use the form in your "FY21 GFTA Application" Folder as the Master Copy that will be uploaded as an attachment upon completion. That way you can copy and paste the responses they send you into the actual document that will be uploaded.
7. Finally, after you have worked through this form and prepped your responses, AND all questions on the Narrative Form are complete, AND you have gathered all the required attachments, log into the Salesforce system at <https://gfta.force.com/s/>

There, you will enter your prepared answers from this ONLINE PORTAL GUIDE, and upload all required attachments including the NARRATIVE FORM.

On the Application Page (see Screenshots document), you can review and edit your answers without having to go screen by screen through the pop-up application.

When all that is done, press the Submit Application button. You will receive an email confirmation receipt.

The following pages show what will be asked on each screen of the online portion of the application.

You will first need to complete the **ELIGIBILITY QUESTIONNAIRE** before gaining access to the application proper. Following are the questions you will need to answer; they each require a Yes or No response.

1. Is your organization a 501(c)(3) nonprofit or do you have a valid fiscal sponsor?
2. Is your organization part of a government agency or program?
3. Has your organization or applying program maintained a corporate address in the City and County of San Francisco, for at least three full years?
4. Is your organization in compliance with Grants for the Arts, other City departments and programs and GFTA fiduciary partners and grantees?
5. Does your organization have a mission or program with the primary purpose being the public performance or display of art in the City and County of San Francisco?
6. Does your organization present at least one public performance or display of art works in the City and County of San Francisco for the general public, including visitors, within the grant year of July-June?
7. Is your organization willing and able to meet the requirements associated with receiving funds from the City and County of San Francisco?
 - Comply with the City of San Francisco's insurance and business tax requirements;
 - Comply with provisions of Chapter 12B of the San Francisco Administrative Code which prohibits discrimination on the grounds of race, color, creed, height, weight, national origin, ancestry, age, sex, sexual orientation, gender identity, disability;
 - Comply with Chapter 12L of the San Francisco Administrative Code which requires grantees receiving more than \$250,000 in City or City-administered funds to hold open board meetings, make financial records available to the public, and make good faith efforts to promote community membership on its Board of Directors;
 - Comply with any additional requirements the City Attorney may add to the Grant Agreement
8. Does your organization receive non-GFTA sources of funding?
9. Does your organization receive 50% or more of its budget from a single source of contributed revenue?

Section 1: Organization Information

- Organization Name
- Website
- Executive Director
- Proposal Contact (whom to direct questions about your application)
- Contact Phone Number
- Contact Email
- Discipline {drop down menu}
- Organization Description (one or two sentences stating what your organization's core mission is and who your target communities are if any)
- Current GFTA Grant (enter \$0 if none)
- What is the amount of your request?
- Fiscal Year Begin Date
- Fiscal Year End Date
- Organization History with GFTA {Drop Down Menu} (select the timeframe that is applicable to your organization): New to GFTA / Under 5 years / 5-10 years / Over 10 years
- Grant Plan: a short phrase summarizing the type of activity this grant will support. There is no need for specifics, it should be a general statement like, "To produce a series of dance performances in San Francisco".
- Space Occupancy {drop down menu}: Rent/Lease ; Ownership; Co-Op/collective; No physical space
- Are you at risk of displacement? Checkbox if Yes.
- Does your organization have a Fiscal Sponsor? If your answer here is yes, a new screen will open asking for your Fiscal Sponsor contact information.

When completing the online screen, click **NEXT** to save your work.

Section 2: Program information

These responses will all be selected from picklists. Some will allow you to select more than one option by pressing CTRL (Apple button on a Mac) as you click your selections.

- **Intended Ethnicity Served:** Asian/Pacific Islander; Black or African American; Caucasian; General Audience, no specific ethnicity; Latinx; Middle Eastern; Mixed Race/Multi-Race; Native American/Indigenous
- **Intended Economic Status Served:** Low-Income; General, no specific income level
- **Intended Population Served:** Disabled; General; LGBTQ+; Refugees/Immigrants; Seniors; Trans/Gender Non-conforming; Veterans; Youth and Families
- **Intended Neighborhood Served:** Bayview; Bernal Heights; Castro/Upper Market; Chinatown; Citywide; Crocker Amazon; Diamond Heights; Central Market; Civic Center; Excelsior; Fillmore/Western Addition; Financial District; Glen Park; Golden Gate Park; Inner Richmond; Inner Sunset; Lakeshore; Lower Haight; Marina; Mission; Nob Hill; Noe Valley; North Beach; Ocean View; Outer Mission; Outer Richmond; Outer Sunset; Pacific Heights; Russian Hill; Seacliff; South of Market; Treasure Island/Yerba Buena Island; Tenderloin; Twin Peaks; Upper Haight; Visitacion Valley; West of Twin Peaks
- **District Intentionally Served:** Districts 1 – 11 are options.
- **Intended Cultural District:** Bayview African American; Calle 24; Castro; Chinatown; Comptons Transgender; Japantown; Leather LGBTQ+; Mission Expansion; Native American; SOMA Pilipinas; Western Addition

When completing the online screen, click **NEXT** to save your work.

Section 2A: Site Visit Planning

Here we ask you to specify an event you'd particularly like GFTA staff or Advisory Panel members to attend.

- Event
- Date(s)
- Venue

Due to scheduling we may not be able to attend the specified event, but will make it our highest priority for site visitation.

When completing the online screen, click **NEXT** to save your work.

Section 3: Event Overview

Here we ask for your FY19 or 2019 totals for the following:

- Number of Ticketed Events
- Number of Free Events
- Total Ticketed Attendance
- Total Free Attendance
- Lowest Ticket Price
- Highest Ticket Price

When completing the online screen, click **NEXT** to save your work.

Section 4: Financial Information

We ask for the same 5 numbers for four fiscal years. You can use the chart below to prepare your figures before you log into the system to enter them. Each year will open its own separate page in the system.

	FY16 or 2016	FY17 or 2017	FY18 or 2018	FY19 or 2019
Total Contributed Revenue				
Total Earned Revenue				
Total Artist Fees and Commissions				
Total Personnel Expenses				
Total Expenses				

NB: Total Personnel Expenses includes salaries, benefits, payroll taxes, and independent contractors; it does NOT include payment to artists.

If you are on a fiscal year, use your fiscal year. If you are on a calendar year, use the calendar year.

When completing the online screen, click **NEXT** to save your work.

Section 5: Personnel Information

- Number of Full-time Employees
- Number of Part-time Employees
- Total Employees (autosum)
- Number of Volunteer Workers
- Number of Volunteer Artists
- Total Number of Volunteers (autosum)
- Number of Independent Contractors
- Number of Paid Artists
- Number of Board Members

When completing the online screen, click **NEXT** to save your work.

Checklist

The following attachments are **required**. After the above section, you will be able to upload the requested items. PDFs are preferred.

- 1. Narrative Form: completed narrative questions
- 2. List of Board of Directors or Advisory Committee
- 3. Letter of Authorization signed by the President of your Board or your Fiscal Sponsor's Board
- 4. Grants List: Grants received or expected for FY19 and FY20 (2019 and 2020 if on a calendar year)
- 5. Operating Budget for your CURRENT year
- 6. Financial Statements for your most recent completed year (most likely this will be FY19 or 2019). Includes a Profit & Loss Statement and Balance Sheet. Organizations with budgets over \$2 Million will need to provide the most recent audit; organizations of less than \$2 Million AND a grant of \$50,000 or more must provide a review.
- 7. Second most recent Financial Statement using the same guidelines as above. (Most likely FY18 or 2018)
- 8. IRS Form 990 or 990-N Postcard dated within the last two years
- 9. IRS Form 941 (if applicable) for your last completed quarter
- 10. Proof of Good Standing with the IRS; Publication 78 confirmation. Obtained at <https://apps.irs.gov/app/eos/pub78Search.do>
- 11. List of your 2019 San Francisco Events
- 12. List of your planned 2020 San Francisco events
- 13. Program Samples: these can include programs, brochures, flyers, press clippings, etc. in a single PDF. Please include your best/favorite samples and not every single item produced in the past year.

See next page if you are using a Fiscal Sponsor.

If you are using a Fiscal Sponsor, these additional items will also be required.

- FS1. Letter of Authorization Signed by the President of your Fiscal Sponsor's Board
- FS2. Copy of Fiscal Sponsorship Agreement detailing roles and responsibilities of both parties
- FS3. Current list of Fiscal Sponsor's Board of Directors or Advisory Committee
- FS4. Letter Signed by Fiscal Sponsor stating that the submitted financial information has been reviewed for accuracy
- FS5. Fiscal Sponsor's most recent 990. **If your Fiscal Sponsor is a GFTA recipient and will be submitting their 990 with their own application, this can be skipped.**
- FS6. Fiscal Sponsor's Financial Statement including Profit & Loss Statement and Balance Sheet. **If your Fiscal Sponsor is a GFTA recipient and will be submitting their own financials, this can be skipped.**
- FS7. Fiscal Sponsor's 501(c)(3) Determination Letter from the IRS. **If your Fiscal Sponsor is a GFTA recipient, this can be skipped.**

The final screen before Submitting the application is a **Certification and Release**.

- Organization Name
- Name of person making this representation on behalf of the organization

This certification and release must be signed by the individual applicant or principal officer of the organization with the knowledge of the matters contained herein and with legal authority to obligate the organization.

The undersigned certifies that all information contained herein is accurate or represents a reasonable estimate of future operations, based on data available at the time of application; and, that there are no misstatements or misrepresentations contained herein or in the attachments. The individual applicant or organization will comply with the federal laws that regulate Fair Labor, Civil Rights, Accessibility, and other regulations and City requirements in this grant application. The undersigned hereby releases the City & County of San Francisco, Grants for the Arts, and their respective officers, employees and agents, from any and all liability and/or responsibility concerning damage to or loss of materials submitted to Salesforce, whether or not such damage or loss is caused by the negligence or intentional acts or omissions of Salesforce, its respective officers, employees and or agents.

- I acknowledge and agree to the terms stated above: (Pick List)
 - Yes
 - No

This date constitutes a signature

- Date