PANEL HANDBOOK

Organizational Grant Program

2019-20

LA COUNTY ARTS COMMISSION
ORGANIZATIONAL GRANT PROGRAM
2019-20 PANEL HANDBOOK

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ABOUT THE LOS ANGELES COUNTY ARTS COMMISSION

The Los Angeles County Arts Commission fosters excellence, diversity, vitality, understanding and accessibility of the arts in Los Angeles County. The Arts Commission provides leadership in cultural services for the County, encompassing 88 municipalities, including funding and job opportunities, professional development and general resources. www.lacountyarts.org.

ABOUT THE ORGANIZATIONAL GRANT PROGRAM

The Organizational Grant Program (OGP) provides financial support to assist and strengthen nonprofit arts organizations to provide quality arts services to enrich the lives of Los Angeles County residents. In 2018-19 the Arts Commission distributed $4.5 million in grants to 216 nonprofit arts organizations through the OGP.

The OGP funds organizations who work in a variety of disciplines including dance, literature, media, music, theatre, traditional and folk art and visual art. The OGP also supports arts education, arts service and presenting organizations. Applications are accepted on an annual basis. See OGP Guidelines for more information.

APPLICATION REVIEW

Prior to the panel meeting, please read and evaluate all of the applications that you have been assigned. **Panelists must review all material (OGP application, supplemental materials such as Letters of Recommendation and OGP Data Arts Funder Report) in advance of the meeting to ensure enough time to score the application appropriately based on the review criteria on the day of the panel meeting.** No time will be provided for reading applications on the day of the panel meeting. Note: artistic documentation (work samples) will be reviewed in person on the day of the panel.

Note that each application will include links to artistic (work samples) and supplemental materials like audio, video and images submitted by the applicant for review.

Read through the OGP Review Criteria included with this panelist packet to facilitate scoring and initial assessment. All application and attached supplemental materials assigned to your panel are viewable in the list of OGP applications in your panelist dashboard on the Fluid Review system (https://www.lacountyarts.org/apply). Simply click on each application to view the full application packet.

Read, review and make preliminary scoring decisions for each application based on the initial review **prior to your panel meeting on the panel scoresheet in Fluid Review**. Following your assessment of all the applications assigned to your panel, it is **recommended that you download each application and your scores/rankings from the Fluid Review system** in order to easily access the application materials, notes and initial scores during the meeting. Panelists should have all materials available at the panel meeting either as printed copies or by accessing the materials online on Fluid Review using a laptop or other electronic device.

An overview of the review process, panel preparation instructions, and panel meeting logistics is included in this document. Please take a few minutes to read through this *Panelist Handbook* and *Reviewer Guide* and contact staff if you have any questions. Important links and information for accessing the applications will be sent to you via email. The below is a list of the items you will need to access before beginning the review. *Please note that items 1-7 will be available on our OGP panelist webpage at: https://www.lacountyarts.org/ogp-panelists. Items 8-10 were included in the confirmation email that was sent by grants staff with instructions for review and logging in to the online grant portal.*

1, 2, 3. OGP Review Criteria, Guidelines and Sample Application – These are the official application guidelines and criteria that were provided to applicants in order to complete the application along with a sample online application.

4. Implicit Bias, Cultural Competency, Cultural Equity and Inclusion Resources and Articles – A list of helpful resources including links to articles that address grantmaking through the lens of cultural equity and inclusion.

5. Conflict of Interest Form – Please print out and bring completed with you to the panel. If you determine that there is a conflict with more than two applications, please contact me as soon as possible and I will try to switch you to a different panel.

6, 7. OGP Payment Invoice & W9– If you would like to receive an honorarium of $200, please complete these forms and bring them with you the day of the panel. If you have issues or questions at any time while you are reviewing the applications for panel, please do not hesitate to contact grants staff.

8. Applicant Roster – Includes the names of all the organizations in your panel pool, in the order in which they will be discussed on the day of panel. *This list was sent via email as an attachment.*

9. Memorandum of Understanding – Organizational Grant Program Panelist Participation Form
Please review, e-sign and return via the Adobe Sign program or by scanning and emailing the document to grants staff at grants@arts.lacounty.gov. *The link to the Adobe Sign version of this form was sent via email and allows participants to electronically sign the form online.*

10. Memo Regarding Organizations with Errors/Issues/Missing Items – Grants staff have highlighted any issues with applications that are important for panelists to note. Please review the memo (if you receive one) prior to reading each application. The memo is to verify if any of the applications in your panel had issues you should be aware of for determining the quality of the application. *Note: Some panels will not include this memo*. *If there were errors, this memo was sent via email as an attachment.*

Office Location & Parking - Our offices are located at **1055 Wilshire Blvd. Suite 800, Los Angeles, CA 90017**. Free validated parking will be offered at the lot next door located at **636 South Bixel, Los Angeles, CA 90017**. **Do not park in the lot under our building as we cannot validate parking for this lot.**

TO ASSIGN A PRELIMINARY SCORE AND MAKE COMMENTS ABOUT EACH APPLICATION:
We recommend that you enter scores and comments directly on the scoresheets in Fluid Review.

IMPORTANT REMINDER

On the day of the panel, please be sure to bring:

1. A laptop, tablet or iPad with your downloaded copy of each application and/or printouts of each application and OGP Funder Report.

2. PDF or printouts of preliminary scores and comments for each application on your scoresheets.
3. Completed W-9 and invoice
4. Completed MOU – OGP Panelist Participation Form (if you have not submitted previously)

WHAT'S NEW WITH THE OGP

There are three categories of changes affecting the 2019-20 Organizational Grant Program application, guidelines and requirements. We have provided a summary of these changes below for panelists to understand how these changes affect the application process.

1) A new requirement for all applicants to submit a board-adopted cultural equity and inclusion statement, policy or plan as part of the Cultural Equity and Inclusion Initiative;
2) Clarification of existing eligibility requirements;
3) Additional changes that streamline the application process and reduce the administrative burden for applicants.

OVERVIEW OF CULTURAL EQUITY AND INCLUSION INITIATIVE (CEII) AND THE ORGANIZATIONAL GRANT PROGRAM (OGP)

In November 2015, a resolution directing the Los Angeles County Arts Commission to conduct "a constructive County-wide conversation about ways to improve diversity in cultural organizations" for all LA County residents was unanimously passed by the Board of Supervisors with a focus on five key target areas: Boards of Directors, Staffing, Audience/Participants, Programming, and Artists/Creators.

Thirteen actionable recommendations to improve cultural equity and inclusion in the arts emerged. These recommendations open the doors to resources and promote tools that can break down barriers of exclusion in a way that fosters and promotes arts and culture – as well as the benefits they provide – for all residents of LA County. Click here to read more about this 18-month public process and the 13 recommendations approved by the Board of Supervisors.

The Los Angeles County Cultural Equity and Inclusion Initiative three-part vision statement is as follows:

Inclusion and access: Every resident of Los Angeles County shall have opportunities and access to encounter, appreciate, participate in, learn and be informed about the arts and culture.

Equity: Arts and cultural organizations and artists from all disciplines and cultural traditions shall be valued equally and supported equitably.

Diversity: Arts and cultural organizations shall reflect and embrace the diversity of the County in staffing, board leadership, programming, including artists, and audiences/participants.

Guiding principles are outlined below:

- Every individual participates in creative thinking and expression.
- Every individual has the right to engage in arts and culture that celebrate their highest potential.
- Our community's diversity is an asset to our arts and cultural environment and our economy.
- Including communities through the arts and culture achieves our highest potential, by promoting mutual respect and understanding.

There are three significant changes to the guidelines each marked with an asterisk below.

BOARD APPROVED CEII STATEMENT, POLICY OR PLAN REQUIREMENT*

Beginning in fall 2018, all applicants to the OGP Program are required to submit board-adopted cultural equity and inclusion statements, policies or plans that outline their commitment to diversity, equity, inclusion and access as part of their applications.

To assist applicants with preparing for this new requirement, the Arts Commission offered a number of free workshops designed to help applicants either clarify and begin outlining applicant organization's relationship to cultural equity and inclusion, or to deepen the policies already in place. Click here to learn more about this new requirement.

Panelists will not review these materials, however. They will be reviewed by staff for completion and compliance purposes. Additional and updated questions in the application will allow applicants to provide information about how the organization is currently addressing and taking steps to integrate and reflect the values of cultural equity and inclusion in their work.

REVIEW CRITERIA POINT REDISTRIBUTION*

In light of the new CEII recommendations a redistribution of points assigned to review criteria has been implemented. The maximum point total for the Awareness of/Response to Community Need – Criterion 5 has changed from 20 to 25 and point distribution for artistic quality has changed from 40 to 35.

Criterion	Prior Point Distribution	New Point Distribution
Artistic Quality of Organization	40	35
Organizational Readiness/Management Capacity	15	15
Quality of Project Plan	20	20
Quality of Project Evaluation	5	5
Community Need/Audience	20	25

UPDATED APPLICATION QUESTIONS*

The application will now include additional questions to allow applicants to address how the values of cultural equity and inclusion are integrated and reflected. To review a sample of the new application, click here.

CHANGES TO REQUIREMENTS FOR ARTS EDUCATION PROGRAMS/PROJECTS

Arts Education organizations that are applying for funding for arts education programs and/or related projects are still required to provide a sample of their curriculum and demonstrate quality teaching and learning in their educational materials and artistic samples. However, although it is still encouraged of all arts education applicants regardless of format, the requirement to link the programming to Visual and Performing Arts (VAPA) or other state content standards has been lifted for organizations whose programs or projects do not involve school-based programming. Additionally, organizations that are providing mainly "community-based" arts education programming are no longer required to provide a curriculum with their applications.

CHANGES TO FINANCIAL DOCUMENTATION REQUIREMENTS

There are two changes to the financial documentation requirements in the application:

Audit Threshold
Financial Audits are now required only for organizations with budgets of $2 million or more.

DataArts Analytic Report
In prior years, two financial reports sourced from the DataArts website were required with applications – the OGP Funder Report and the Analytic Report. The Analytic Report requirement has been eliminated and now only the OGP Funder Report is required with the application.

ELIGIBILITY CLARIFICATION

In order to further clarify eligibility requirements for 501(c)3 organizations affiliated with municipalities or other county agencies this section of the guidelines has been amended. The description of organizations that are not eligible to apply to OGP now includes the following language:

- Municipal or County government agencies, departments, and cultural institutions that have a line item in the Los Angeles County budget, and related 501(c)3 foundations affiliated with those institutions identified in the Los Angeles County budget.

PANEL SERVICE

Peer panelists review, assess and score grant applications. Panelists' assessments and scores become the basis for applicant rankings and recommendations to the Arts Commissioners. Panelists **do not** recommend funding amounts or set the cut-off score below which applicants are not funded.

PANEL PREPARATION

Prior to the panel meeting, **please read and evaluate *all* of the applications you have been assigned**. Panelists are expected to be familiar with the contents of each application, **including the DataArts OGP Funder Report and any supplemental attachments like arts education materials, reviews and letters of recommendation**. Artistic documentation (work samples) will be reviewed in person on the day of the panel. It is recommended that panelists review the applicants' artistic documentation in advance of the meeting. These materials will also be briefly reviewed during the panel meeting. ***You should plan to allocate approximately 30-45 minutes for reading each application and making initial assessments. This includes review of the materials submitted with the application.***

Arts Commission staff will host panel orientations via webinar prior to the panel meetings. It is highly recommended that you participate in one of these orientations. You will be informed of the dates and registration information via email.

As you review applications please keep in mind:

- Awards are made on the basis of **merit**, not need.
- Grants must be matched at least dollar-for-dollar by the applicant organization.
- Reimbursable activities must take place between July 1, 2019 and June 30, 2021.

We ask you to assign a preliminary score and take notes for each review criteria as you review the applications prior to the meeting. Be sure to download and bring these scores and notes with you on the day of the panel. Please note that the 100-point scoring system assigns a greater maximum point value to artistic quality than to the other criteria as the Arts Commission believes artistic quality to be a fundamental consideration. If you have questions about an application, please request clarification from grants staff rather than contacting the applicant organization directly.

PANEL MEETING COMMENTS

It is part of the Arts Commission's mandate to foster excellence in the arts in the County of Los Angeles. Therefore, the Commission views the peer panel process as not only a means to allocate grant funds but also to assist in the administrative and artistic growth of the organizations through helpful feedback about their management and programs. Comments and advice given by a panel of peers carries tremendous weight with the applicants.

The Arts Commission encourages panel comments that are balanced, acknowledge strengths and identify weaknesses of the application, offer constructive suggestions for improvement, and convey respect at all times. Panelists should consider each application on its own merits.

Arts Commission staff will take notes on comments made during the panel meeting. Applicants are encouraged to make phone appointments with the grants staff subsequent to the award date to discuss panel comments. While audio from panels is recorded to assist staff in compiling notes, comments are not attributed to specific panelists and the audio is not shared.

CONFLICT OF INTEREST POLICY

It is presumed that panelists will have knowledge of, and connections to, applicant organizations and their representatives. Your qualification to advise the Arts Commission rests, in part, on your familiarity with the local arts community.

The Arts Commission defines conflict of interest as a current or recent affiliation with an applicant from which you have derived or will derive material benefit. A panelist must not score or otherwise vote on a grant application if he or she stands to gain personally from a positive or negative review of a given applicant. For example:

- An immediate family member or "significant other" is currently employed by the organization or is a board member.
- You have served on the organization's board of directors within the past year.
- You have received fees for services from an organization within the past year.
- You have a contractual disagreement with an organization or its management.
- You are an unpaid volunteer who serves as or holds a formal position with the organization.

In advance of the panel session, please complete the Conflict of Interest Form that has been emailed to you; forms will be collected at the beginning of the meeting. **Please contact the Arts Commission in advance of your panel meeting to disclose conflicts of interest with applicants or if you have questions about this policy.**

DATA ARTS CULTURAL DATA PROJECT (CDP)

The DataArts Cultural Data Project (CDP), formerly known as the California Cultural Data Project is an online system for collecting and standardizing information about an organization and its contributions to the cultural sector. The project is a collaboration of nearly 40 public and private funders across California, most of which require arts and culture organizations to complete a Data Profile annually as part of their funding application processes. Applicants need to complete a Data Profile only once at the close of each fiscal year in order to apply to any of the participating funders. In addition to streamlining the application process, the CDP gives arts organizations the ability to track and analyze their financial and organizational data over time as well as compare their organization with similar types of organizations

Since the 2009/10 grant cycle, applicants to the Organizational Grant Program have been required to submit a Funder Report as an essential part of their grant application. **The OGP Funder Report from DataArts reflects the organization's quantifiable financial and programmatic data, from audience numbers to the organization's most recent budget to board giving, to name a few examples.**

Panelists will find the OGP Funder Report as an attachment with the applications they will review. Applicants have been instructed to explain variances of 10% or more in the "Financials" form of the application.

To supplement the OGP Funder Report, all applicants have submitted Form 990s. Those with budget sizes of $2,000,000 or more have also submitted financial audits. All financial documentation must be consistent and reflect information for the same fiscal year.

BUDGET CATEGORIES & OGP REQUESTS

The Arts Commission defines budget size as total operating revenue less in-kind for the most recently completed fiscal year. This number can be found on Page 1 of the applicant's OGP Funder Report (in red font). Budget size does not include any revenue dedicated to a cash reserve, endowment and/or capital project. See OGP Guidelines for more information.

Grant Budget Category	Budget Size
OGP 1	Up to $199,999
OGP 2	$200,000 - $999,999
OGP 3	$1,000,000 - $14,999,999
OGP 4	$15,000,000+

PROJECT CATEGORIES

OGP 1, OGP 2 and OGP 3 applicants may request support for any one of the project categories described below. Organizations whose project request fits into more than one project category should select the one category that best describes the request, as demonstrated by the project budget. OGP 4 applicants must request funds for accessibility projects.

SUSTAINABILITY
Sustainability requests support existing artistic and/or administrative projects that advance the goals of the organization. Competitive applicants should clearly define the organization's mission and goals and articulate how the requested project will sustain these goals.

ORGANIZATIONAL CAPACITY
Organizational Capacity requests support new projects that increase the organizational capacity and infrastructure of arts organizations. Competitive applicants should assess the challenges facing their organization and determine a sustainable plan of action to address one or more of these challenges.

ARTISTIC CAPACITY
Artistic Capacity requests support new projects that increase the artistic capacity of arts organizations. Competitive applicants should assess the artistic needs of their organization and determine a sustainable plan of action for achieving the organization's aesthetic aspirations.

ACCESSIBILITY
Accessibility requests support new or existing projects that provide public access to arts activities and programs. This category enables organizations to make productions, exhibitions, workshops, performances, residencies and/or other arts activities easily accessible to the public.

ARTS EDUCATION REVIEW PANELS
An arts education peer review panel will assess all OGP applicants that designate themselves as an arts education organization or are requesting support for an arts education related program or project.

Arts education panelists will evaluate applications on the basis of the OGP review criteria attached with the panelist materials. The artistic quality [criterion 1 of the OGP review criteria] for arts education organizations or for arts education projects is defined in terms of the *quality of the instruction* provided

to children and youth. Please note that depending on the type of arts education project, the applicant may or may not include a curriculum with their support materials.

ARTS EDUCATION ORGANIZATIONS & ARTS EDUCATION REQUESTS

To support the vision to ensure that every public school student in Los Angeles County will receive a high quality K-12 education of which the arts are an intrinsic part of the core curriculum, **the Arts Commission requires applicants to meet the following guidelines regarding arts education:**

1. All organizations that designate themselves as an arts education organization or are requesting support for an arts education-related program or project must demonstrate quality teaching and learning.

2. In addition, **if the arts education programming in the request is a school-based program**, the schools or districts must make a financial investment in the program. This investment may include the costs of artist fees, bussing, curriculum supplies, administrators or teachers' time for curriculum planning, professional development or exhibiting student work.

3. Lastly, **if the arts education programming in the request is a school-based program**, the applicant must provide a sample copy of a curriculum. Acceptable curriculum materials will reflect the full scope of the program and may include lesson plans, teacher guides and/or student study guides. Regardless of the format, the sample must address the connections to the Visual and Performing Arts Content Standards for California Public Schools.

Though "community-based arts education" applications must still meet requirement number one above, they are not required to provide proof of financial investment from a school or district and they no longer are required to provide a sample curriculum. Curriculum samples are optional specifically for this type of arts education programming.

ARTS SERVICE ORGANIZATIONS

Arts service organizations provide specialized services to the arts and cultural community. These organizations can be discipline, geographical, or culture-based, or can serve the entire arts community. Services offered can include, but are not limited to, professional development and technical assistance such as marketing, legal and financial assistance, networking opportunities, educational forums and workshops, and printed/online materials including calendars, newsletters, and other resources.

Artistic quality [criterion 1] for arts service organizations is defined in terms of the *quality of service the applicant offers to each group of its stakeholders*, which may encompass one or more of the following:

- Arts organizations,
- Individual artists and/or
- Members of the public.

Arts service panelists will evaluate applications with a focus on the organization's mission in relation to its programming and **look for evidence that the organization effectively connects its members/stakeholders to resources and creates opportunities that demonstrably advance member organizations and individuals.**

HONORARIUM

In appreciation of the time and energy panelists dedicate to the panel review process, panelists receive an honorarium of $200. Forms will be collected at the beginning of the panel meeting. The honorarium check will be mailed to the address specified on the form within 4-6 weeks.

OGP TIMELINE

September - November
The Arts Commission conducts Organizational Grant Program workshops throughout Los Angeles County. New, recently disqualified or declined applicants must attend a workshop.

October 31
Application deadline

November - December
Arts Commission staff reviews applications for completeness and contacts applicants for missing materials.

February - March
Peer panels meet and score applications by discipline.

April
Arts Commission staff summarizes panelists' comments for each application. Applicants are ranked by OGP category in order of their score.

A representative from each grant panel appears before the Arts Commissioners to present a panel report communicating their perceptions of the panel and answers Commissioners' questions. Arts Commissioners review scores and comment summaries.

May
Arts Commissioners approve OGP scores and establish cut off levels.

June
Grant award recommendations are presented to the Board of Supervisors for approval.

July
The Arts Commission sends award notification letters and contracts to grantees. OGP grants are disbursed on a reimbursement basis after full execution of the grant contract. Organizations must expend a portion of their grant and an equivalent amount in matching funds before they are able to request a grant payment.

PANEL MEETING LOGISTICS

Grants and Professional Development staff will facilitate the panel meeting.

1. Panelists are provided with a light breakfast, coffee, tea and water. Staff and panelists introduce themselves. Staff collects conflict of interest forms, W9 and honoraria invoices.

2. Panelists will review each application for a maximum of 15 minutes.

3. Panelists review the applicant's artistic documentation as a group. When panelists feel that they have seen enough of the documentation to form a judgment, they raise their hands to indicate that they are ready to move on.

4. Each panelist comments on the artistic documentation and the artistic quality of the applicant.

5. In turn, panelists comment on the remaining review criteria: organizational readiness, management capacity, project plan, project evaluation and audience/community needs. Organizational effort in cultural equity and inclusion will also be discussed. All panelists are expected to provide comments on each application.

6. Following each application discussion, panelists report a preliminary score for the applicant.

7. After reviewing several applications, panelists either break for lunch or elect to work through lunch. Lunch is provided by the Arts Commission.

8. After all of the applications have been reviewed, staff averages the scores and generates a table with the first round of scores, ranked from highest to lowest within each OGP category. Each panelist reviews his/her score for each applicant for accuracy. If there is a wide disparity between the highest and lowest score given to an application, there is additional discussion and individual score adjustments may be made. Panelists as a body may also elect to raise the score of an applicant. When consensus is reached, staff tallies final scores and collects score sheets.

8. At the conclusion of the panel meeting, panelists share ideas for improvement with staff. The Arts Commission values the perspectives of panelists and relies upon them to suggest ways to make this public grant program more responsive to applicants' needs.

FREQUENTLY ASKED QUESTIONS

APPLICATION REVIEW

Q: This arts organization spends much of its time performing/exhibiting outside Los Angeles County. Shouldn't County funds be focused on organizations that perform exclusively within the County?

A: No. Engagements outside of Los Angeles County provide crucial earned income for arts organizations and also contribute to the County's reputation as a culturally vibrant region.

Q: Based on the narrative, I really feel that the organization has asked for the wrong project. They really should be working on this other area. Is it okay to score them lower?

A: **Yes.** If you feel that the proposed project will not address the priority needs identified by the organization, you may reduce its score.

Q: This applicant really needs/doesn't need this money. May I factor this into my score?

A: No, you may not. Assess applications according to merit, <u>not perceived need</u>. All nonprofit arts organizations need funds.

Q: Can I deduct a standard number of points for applications with misspellings, poor grammar, etc.?

A: While a poorly presented application does impact scoring insofar as it fails to convey vital information, do not make any point deductions on the basis of "looks" alone.

Q: Can I deduct a standard number of points for applications with missing or incomplete information like budgets, board and staff bios, etc?

A: If the applicant fails to convey vital information for the project, you may use the review criteria to address whether or not this missing information makes an impact on the overall application, however, do not make any point deductions on the basis of "looks" alone.

CONFLICTS OF INTEREST

Q: I know the executive director and a few of the board members. Is there a conflict of interest?

A: If you feel capable of objectively assessing the organization and you have not materially benefited from your association with the executive director/board members for the past 12 months, there is no conflict of interest.

Q: I've been in discussions with the organization's staff members about a joint project a few months from now. Do I need to excuse myself from the discussion?

A: Yes. If it is possible that you may derive future material benefit from an upcoming collaboration, you may not vote on the organization's application.

EMERGENCIES

Q: It is the morning of the panel. I or my child is severely ill. What do I do?

A: Please make every effort to honor your commitment to serve on the grants panel. While it is important to have all panelists present at the session, if you can't attend, you can't. Please leave a voicemail on the Arts Commission's main line (213) 202-5858 in advance of the session.