



2024 ATOS ENDOWMENT FUND GRANTS

TO: 2023 ATOS Endowment Fund Grant Applicants
FROM: ATOS Endowment Fund Trustees
SUBMISSION DEADLINE: **April 1, 2024**

The purpose of the ATOS Endowment Fund is to assist ATOS Chapters or other not-for-profit organizations engaged in theatre pipe organ **programs or projects** which will have a lasting impact on the preservation or presentation of the theatre pipe organ as a historically American instrument and musical art form. Grants may also be awarded for projects or programs of historical or scholarly merit and other projects, or programs as approved by the ATOS Board of Directors. Since its beginning, the Endowment Fund has awarded more than \$500,000.

Only 5% of the value of the fund may be used for grants in any one year. Only one application per ATOS chapter, organization or person per year will be considered. Preference will be given to ATOS chapter-owned organs and sponsored projects. All grant applications involving a theatre pipe organ, or component(s) thereof, will be subject to review by the ATOS Technical Committee to determine if the proposed project complies with at least the minimum standards as set forth in the ATOS Guidelines for Conservation and Restoration which can be found on the ATOS web site:

atos.org/program/endowment-fund.

This review may require an inspection of the work in progress, organ components and/or the proposed site where the work is to be done. Following this review, the Chair of the Technical Committee will alert the Endowment Fund Trustees in writing of any possible technical issues with a specific application that could lead to disapproval of the application.

After all applications have been reviewed by the ATOS Endowment Fund Trustees, the Trustees will vote to recommend awarding a specific monetary grant for each of the approved applications. The result of this voting will then be submitted to the ATOS Board of Directors for final approval or disapproval during their Annual Board Meeting, usually in mid-summer.

Applicants will be informed of the results in writing following the Annual Board Meeting.

2023-2024 ATOS ENDOWMENT FUND TRUSTEES

- David Finkel, Chairman
- Dave Calendine, Financial Secretary
- Adrian Phillips, Trustee
- Taylor Trimby, Trustee



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INSTRUCTIONS

To consider your grant application properly, the ATOS Endowment Fund Trustees require the following information (each item not to exceed one page). Applications should be sent by email in PDF or Word format by April 1, 2023, to **endowment@atos.org**.

Please Include the Following:

- Completed Application Cover Sheet.
- Information about your ATOS chapter (or your organization if this is not a chapter project). Include ATOS chapter or membership status and number of voting members. Include a brief history/compilation of the activities for the past 5-10 years, a financial statement of the current assets and include proposed and scheduled activities or concerts for the upcoming year.
- Names, addresses, telephone numbers, postal and email addresses of your President, Vice President, Secretary, Treasurer, and organ curator/crew chief.
- Information concerning the ownership of the organ receiving the grant.
- Detailed description of the project for which the grant is requested. Include financial encumbrances (if any), disposition agreements and written rental or usage agreements with outside parties.
- Summarize prior grants or gifts given specifically to this project. Describe how the project is to be used and how the project will benefit the public and Chapter. Include potential public performance usage estimation for the instrument.
- Breakdown of how the grant will be spent.
 - **Include a project schedule with proposed starting and completion dates.**
 - **Include a budget outline of the project with estimates from vendors for all materials and labor (contracted and volunteer).**
 - **Include the names, addresses, phone numbers and email addresses of all parties that will provide services during the project.**
 - **Include their experience dealing with theatre organs.**



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- Extensive installation/venue and “before” pictures.
- Proof of CURRENT 501(c)(3) status. Submit last year’s IRS form 990, 990-N, or 990-EZ.

Additional Information:

- **Quarterly Status Reports for the duration of the project will be required (see Quarterly Report example). Failure to do so will disqualify applicant from any future endowment funding.**
- **ATOS Chapter Liaison will be in regular contact to ensure proper reporting as required.**
- **A project completion report with a detailed spreadsheet (including receipts, paid invoices, and copies of cancelled checks) on exactly how the funds were used will be required (see Completion Report Spreadsheet example). A report/article for the Journal including before and after pictures are required. Failure to do so will disqualify applicant from any future endowment funding.**
- We also request information on how this grant impacts your programs and the positive impacts made by the organ or program.
- Grantee must allow publication of completed grant activities in the Theatre Organ Journal and on website.



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GENERAL INFORMATION

The following parameters will be considered for the rewarding of all grant requests:

- Artistic merit: Is the proposed project essential to a functional and well “rounded” instrument or program?
- Chapter affiliation.
- Exposure the organ will get with the general public.
- Ownership of organ for IRS purposes.
- Previous funding to the chapter, venue, or organ by the ATOS Endowment Fund.
- Repairs necessary to keep an organ playing.
- Technical approval for the project.

Additionally:

- Grants will not be awarded for re-imbusement of a completed project.
- The recommended monetary grant will be disbursed within 30 days of ATOS Board approval at their Annual Board of Directors Meeting which is held in mid-summer.

By submitting the application for consideration, the applicant/organization/board of directors agrees to adhere to all requirements indicated in the Endowment Fund Grant Application.

Please submit your complete application via email to:

endowment@atos.org

If you should have any questions or need further assistance, please contact David Finkel, Chair, at d.finkel@atos.org or call 317.402.2521 or Taylor Trimby at t.trimby@atos.org.