



2022 ATOS ENDOWMENT FUND GRANT

TO: 2022 ATOS Endowment Fund Grant Applicants
FROM: ATOS Endowment Fund Trustees
SUBMISSION DEADLINE: **April 1, 2022**

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 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. **The recommend/approved monetary grants will be disbursed to the applicants within 30 days of the Annual Board Meeting.**

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

2021-2022 ATOS ENDOWMENT FUND TRUSTEES

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



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INSTRUCTIONS

To consider your grant application, the ATOS Endowment Fund Trustees requires the following information. Applications should be sent by email in PDF or Word format. **Please do not scan documents.** Completed applications are due no later than April 1, 2022, and should be sent to: **Endowment@atos.org**

Please Include the Following:

- Completed Endowment Fund Grant Application Cover Sheet.
- Information about your ATOS chapter (or your organization if this is not a chapter project).
 - If ATOS Chapter, include membership status and number of voting members.
- Names, addresses, telephone numbers, postal and email addresses of your Chapter/Organization Officers, and organ curator/crew chief.
- Include a brief history/compilation of the activities of the chapter/organization for the past 5-10 years.
- A financial statement of the current assets.
- Information concerning the ownership of the organ receiving the grant.
- Include disposition agreements and written rental or usage agreements.
- 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 for the upcoming year and future usage.
- Installation/venue pictures.
- Project pictures that will substantiate grant.
- Proof of CURRENT 501(c)(3) status. Submit last year's IRS form 990, 990-N, or 990-EZ.



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INSTRUCTIONS (continued)

● Project/Budget Requirements.

- Include a project schedule with proposed starting and completion dates.
- Include a budget outline of the project
 - Include estimates from all vendors for materials (*Endowment Fund Budget Proposal Spread Sheet*).
 - Include estimates for contracted labor.
 - Include the names, phone number, postal and email addresses of all parties that will provide services during the project.
 - Include their experience dealing with theatre organs.
 - Include volunteer involvement in project and their oversight

● Reports

- Quarterly Status Reports for the duration of the project will be required (*Endowment Fund Quarterly Report*). Due on or before the 1st of March, June, September, and December
- A project completion report (*Endowment Fund Final Report*) with a detailed spreadsheet (including copies of receipts, cancelled checks and paid invoices) on exactly how the funds were used will be required (*Endowment Fund Reconciliation Spread Sheet*).
- An article is required on the project with before and after pictures for publication in the Journal and other ATOS social media outlets. Include information on how this grant impacted your chapter and any other potential positive outcomes as well.

● Failure to complete required reports will disallow any future endowment grants.

All required reports and examples are available on the ATOS Web Site atos.org/program/endowment-fund located in the RELATED DOCUMENTS section.



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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 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.
- **By submitting the application for consideration, the ATOS chapter, organization, or person agrees to adhere to all requirements indicated in the instructions.**
- **ATOS Chapter Liaison/assigned ATOS Board member will be in regular contact to relay project status to the Endowment Committee and the ATOS Board and ensure proper reporting is completed as required.**

Please submit your complete application via email to:

endowment@atos.org

If you should have any questions or need further assistance, please contact Taylor Trimby, Chair, at t.trimby@atos.org or call 815.955.0522.