



AMERICAN THEATRE ORGAN SOCIETY

*Feel the Music!*

Michael Fellenzer, Chair, ATOS Endowment Fund

6041 Garver Road, Indianapolis, IN 46208

[m.fellenzer@atos.org](mailto:m.fellenzer@atos.org) 317 251 6962

## **2019 ATOS ENDOWMENT FUND GRANTS**

TO: 2019 ATOS Endowment Fund Grant Applicants

FROM: ATOS Endowment Fund Trustees

SUBMISSION DEADLINE: **March 15, 2019**

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 particular 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 \$275,000.

Only 90% of the dividends and interest earned on the principal 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](http://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. Grants must be used within one year of award date or any remaining funds will be forfeited.

**Please note the submission deadline of March 15, 2019**

### *2018-2019 ATOS ENDOWMENT FUND TRUSTEES*

Michael Fellenzer, Chair & Financial Secretary

George Andersen, Trustee

Bob Maney, Trustee

Adrian Phillips, Trustee

Taylor Trimby, Trustee



## **INSTRUCTIONS**

In order 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 March 15, 2019, [m.fellenzer@atos.org](mailto:m.fellenzer@atos.org). Please do not scan documents.

### **Please Include the Following:**

- Completed Application Cover Sheet (below).
- Information about your ATOS chapter (or your organization if this is not a chapter project). Include ATOS chapter or membership status, number of voting members. Include a brief history/compilation of the chapter's or organization's activities for the past 5-10 years, a financial statement of the chapter's/organization's current assets and include proposed and scheduled chapter/organization activities or concerts for the upcoming year.
- Names, addresses, telephone numbers, postal and email addresses of your organization 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 materials, equipment rental and contracted or volunteer labor. Include documentation on who will do the work, be it professionals or volunteers, and their experience dealing with theatre organs. Include other professional services that will be used. Also provide a projected schedule of project activities (including starting and completion dates). If the grant request is for a portion of a restoration project, please provide a complete budget outline of the complete project. Include the names, addresses, and telephone numbers of individuals and/or companies that will provide services to be paid for by the grant.
- Extensive installation/venue pictures.
- A detailed time line of the installation from inception to planned completion.
- Proof of CURRENT 501(c)(3) status. Submit last year's IRS form 990, 990-N, or 990-EZ.

### **Additional Information:**

- A detailed follow-up report with photographs on exactly how the funds were used prior to final payment from ATOS will be required. Include pictures and commentary. We will also need information on how this grant impacts your programs and the positive impacts made by the organ or program.
- While not a requirement, grant requests with 2 or more bids will be looked upon favorably.
- Grantee must allow publication of completed grant activities in the Theatre Organ Journal and on website.



## **GENERAL INFORMATION**

The following eight parameters (in alphabetical order) will be considered for the rewarding of all grant requests:

- Ability for chapter or venue to self- or partial- fund the project (e.g., through matching funds to the ATOS grant).
- Artistic merit: Is the proposed project essential to a functional and well “rounded” instrument or program?
- Chapter affiliation.
- Completion of grant-funded “project” (not completed organ necessarily) must occur within one year of grant approval.
- 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.
- Grants must be used within one year of the award date of the grant or any portion remaining will be forfeited.
- All completed work, as well as all future work, must meet the ATOS Guidelines for Conservation and Restoration and are subject to inspection by the ATOS Technical Committee. A copy of the guidelines can be obtained from the ATOS web site: [atos.org/program/endowment-fund](http://atos.org/program/endowment-fund).
- Final payment from ATOS will occur after the proper documents dealing with the completion of the project have been submitted.

Please submit your complete application via email to:

Michael Fellenzer, Chair, ATOS Endowment Fund Trustees  
[m.fellenzer@atos.org](mailto:m.fellenzer@atos.org)