Organizational Grant Program Reporting + Invoicing Workshop

Download workshop materials, reporting instructions and OGP contract terms and instructions on our website under "Manage Your Grant" at:
http://lacountyarts.org/grants.html

Online Year 1/Year 2 Report form:
http://lacounty.culturegrants.org

🐦 @LACountyArts

#OGPArtsFunding

Los Angeles County Arts Commission

OGP Contract Overview

- OGP contracting is based on the county fiscal year

  - July 1 to June 30

- Grant funding is awarded in July and covers **two years**

  - July 1, 2014 to June 30, 2016 **OR** July 1, 2015 to June 30, 2017

Featured grantees (from left to right): Diavolo, Ebony Theatre, Film Independent, Flight of Fantasy

OGP Contract Overview

Enriching Lives
Los Angeles County Arts Commission

CONTRACT #: OGP-1-1-1516
Organizational Grant Program Agreement

This Agreement made this _____ day of _____ 2015, by and between the County of Los Angeles ("County"), a body corporate and politic and a political subdivision of the State of California, and:

Organization ("Grantee"): **The Persistence of Memory**

Address: **123 Los Angeles Street**

City, State, Zip: **Los Angeles, CA 90000**

Primary Contact: **Salvador Dali**

Email Address: **Salvador@persistence.org**

DUNS #: **123456789**

Los Angeles County Vendor #: **VC1234**

Section 2. PURPOSE AND SCOPE OF GRANT.

A. The County desires to provide a grant to support Grantee's arts oriented operations and programming efforts in the County. Specifically, this grant award will be used for the following purposes only ("Project"): *To support groundbreaking new productions.*

Section 3. AGREEMENT TERM. The term of this Agreement shall commence on the date this Agreement is executed by all parties hereto and shall expire on: **June 30, 2017**

Section 4. MAXIMUM GRANT AMOUNT. The maximum grant amount payable by the County to the Grantee under this Agreement shall not exceed: **$ 9,800**

CONTRACT #: OGP-1-1-1516
Organizational Grant Program Agreement

Section 5. GRANT BUDGET.

BUDGET	2015/16 GRANT		2016/17 GRANT	
	OGP AWARD	MATCHING FUNDS	OGP AWARD	MATCHING FUNDS
Administrative & Artistic Salaries, Fees & Fringe *See Project Expenses Line: 1, 2, 3, 4, 5, 8, 16, and 28*				
Advertising, Marketing & Public Relations *See Project Expenses Line: 7*				
Operations (Rent, Facilities, Utilities, etc.) *See Project Expenses Line: 6, 12, 13, 18, 19, 21, 23, 24, 29, 30, 31, and 34*				
Fundraising *See Project Expenses Line: 14 and 15*				
Conferences & Professional Development *See Project Expenses Line: 11, 27*				
Programming (Production, Exhibition, Programs, etc.) *See Project Expenses Line: 25, 26, and 32*				
Other *See Project Expenses Line: 12 and 22*				
GRAND TOTAL EXPENSES	**$4,900**		**$4,900**	

- Grantees must demonstrate and report matching funds that ensure Los Angeles County grant funds do not exceed fifty percent (50%) of the total cost of the supported project

Featured grantees (from left to right): Diavolo, Ebony Theatre, Film Independent, Flight of Fantasy

Online Reporting – Go Grants

Los Angeles County Arts Commission

Culture Grants » Los Angeles County Arts Commission »

Welcome to the LA County Arts Commission's online grants system!

Welcome to the LA County Arts Commission's online grants system!

GETTING STARTED
Log in if you or your organization has already created a user account.
Sign up to create a new user account and profile.
Reminder that the system is optimized for use with the following web browsers: Google Chrome, Mozilla Firefox, Safari

Please note: There have been some software glitches in the "New Format" resulting in lost data. It does not affect all computers equally. To be safe, please consider completing your application in the "Old Format" by clicking "Turn new design off" in the upper right corner of your screen.

Online Invoice + Report Website

https://lacounty.culturegrants.org/

(Where you completed your OGP application)

REMINDER
- **Use Google Chrome to access the website**

- **Do not use Internet Expl**

REMINDER
- **Cut+Paste from a Word Document**

- **Submit 5 days prior to deadline to avoid glitches**

Los Angeles County Arts Commission

▌ <u>Project Description (Scope of Work)</u> *

350 characters remaining.

The field is required.

✔ Year 1 Project Budget

	Year 1 Grant OGP Award	Year 1 Grant CASH MATCH	Year 1 Expenses OGP AWARD	Year 1 Expenses CASH MATCH
Administrative & Artistic Salaries, Fees, & Fringe	$0.00	$0.00	$0.00	$0
Advertising, Marketing, & Public Relations	$0	$0	$0	$0
Operations (Rent, Facilities, Utilities, etc.)	$0	$0	$0	$0
Fundraising	$0	$0	$0	$0
Conferences & Professional Development	$0	$0	$0	$0
Programming (Production, Exhibition, Programs etc.)	$0	$0	$0	$0
Other	$0	$0	$0	$0
GRAND TOTAL EXPENSES	$0	$0	$0	$0
	[50% of Total Grant Award]	[Total must equal or exceed OGP award total for the same year]	[50% of Total Grant Award]	[Total must equal or exceed OGP award total for the same year]

✔ Year 2 Project Budget:

Year 2 project budget	Enter Amount from Contract	Enter Amount from Contract	Enter Actual Expense	Enter Actual Expense
	OGP Award	Cash Match	OGP Award	Cash Match
Administrative & Artistic Salaries Fees & Fringe	$0	$0	$0	$0
Advertising Marketing & Public Relations	$0	$0	$0	$0
Operations (Rent Facilities Utilities etc.)	$0	$0	$0	$0
Fund-raising	$0	$0	$0	$0
Conferences & Professional Development	$0	$0	$0	$0
Programming (Production Exhibition Programs etc.)	$0	$0	$0	$0
Other See Project Expenses	$0	$0	$0	$0
GRAND TOTALS	$0	$0	$0	$0
	[50% of Total Grant Award]	[Total must equal or exceed OGP award total for the same year]	[50% of Total Grant Award]	[Total must equal or exceed OGP award total for the same year]

OGP Reporting + Invoicing

- **Reporting**

  - OGP grant reporting is an annual requirement

  - Each year of OGP reporting focuses on different aspects of grant project implementation

- **Invoice Payments**

  - OGP grants are reimbursable

  - All project funds, including matching funds, must be *expended* or *incurred* by May 15

    Note: This year's deadline is May 16, 2016

Refer to the Terms of Instructions of your contract for details.

Supplemental Materials - Checklist

Proof of Expenses – OGP 1 Only

- ☑ QuickBooks or Quicken reports
- ☑ Copies of canceled checks
- ☑ Statements (bank or credit card) showing proof of payment
- ☑ Receipts
- ☑ Signed, dated contracts*
- ☑ Signed, dated statements/invoice from the contracted individual*

*State performed services/duties, dates of employment/services and amount paid.

YOU MUST HIGHLIGHT THE EXPENSES THAT PERTAIN TO YOUR GRANT FUNDED PROJECT

Proof of Recognition

- ☑ Copy of a program, website screen shot or other materials that show the Arts Commission logo

Artistic Documentation

- ☑ 1-3 high quality images

Questions?

Contact Arts Commission Grants staff:

- grants@arts.lacounty.gov

- 213-202-5858

Download instructions at:
http://lacountyarts.org/grants.html

Presenters:

Rosalyn Escobar, Grants Manager

Laura Guerrero Nieto, Grants and Professional Development Associate

Organizational Grant Program Reporting 101 Workshop

Susannah Laramee Kidd, PhD
April 7, 2016

@LACountyArts

#OGPArtsFunding

Today

Part I: Evaluating Your Progress

Part II: OGP Report Questions

Part III: Online Reporting System

Learning Objectives

By the end of today, participants will be:
- ✓ Able to select the appropriate measures of progress for their projects
- ✓ Familiar with qualitative and quantitative data collection methods
- ✓ Familiar with OGP report questions and online reporting system

Why evaluate?

- Documentation
- Effectiveness
- Planning and improvement
- Advocacy

Why do we ask you to do it?

- Demonstrate value and effectiveness
- Grantee trends
- Program improvement

What is evaluation?

Systematic investigations of the **merit** (i.e., quality, excellence), **worth** (i.e., value, cost-effectiveness), and/or **significance** of a project (i.e., impact, importance).
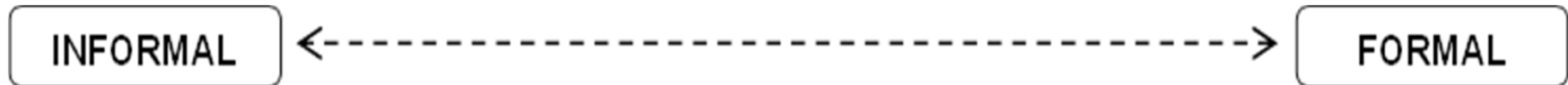
Scriven, M. (1998). Minimalist theory of evaluation: The least theory that practice requires. *American Journal of Evaluation*. *19*(1), 57-70.
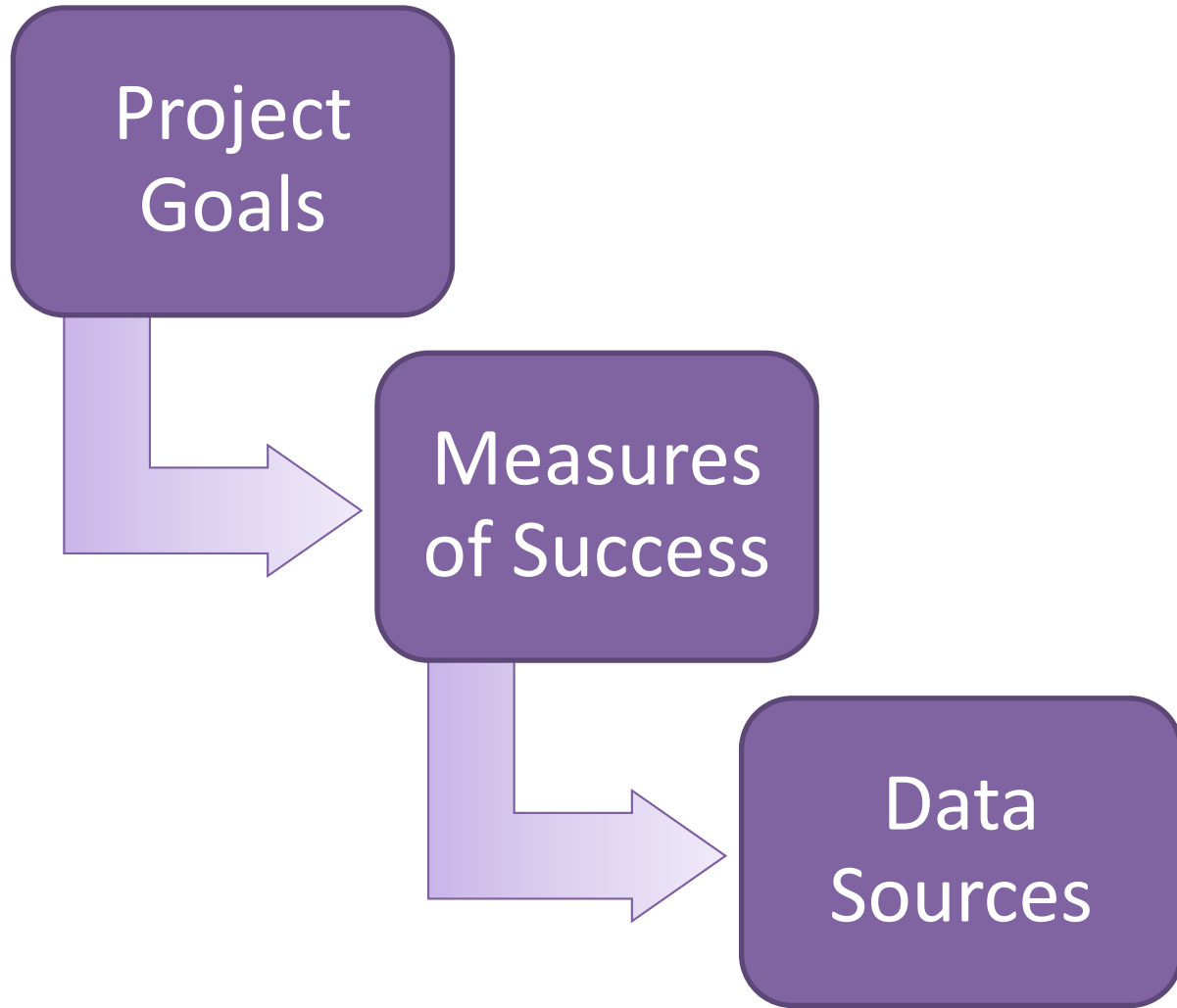
An Evaluation Continuum

"INFORMAL" QUESTIONS   **"FORMAL" STRATEGIES**

OGP 1   OGP 2   OGP 3   OGP 4

INFORMAL ←- - - - - - - - - - - - - - - - -→ FORMAL

Project Goals

AKA Music Education Program

This grant award will be used to support our AKA Assemblies program providing **music performances** during the school day at area schools. We plan to increase the **quantity** and **quality** of our performance offerings during the grant period.

AKA Theatre

We are using our OGP grant to support the **salary of our producing artistic director**. In addition to managing operations, she will direct two shows and lead our New Writers Project. She will also be responsible for objectives related to the **sustainability** of our theater as indicated in our 5 year strategic plan.

Your Turn

Worksheet Question 1

Project Measures

AKA Music Education Program

Provide **music performances** during the school day at area schools. Increase the **quantity** and **quality** of our performance offerings.

Measures:

1. We will **increase** the number of **schools** and **students** served by our assemblies.
2. We will recruit **10 new musicians** to add to our roster.
3. Teachers will **maintain** or **increase** levels of **satisfaction** with our assemblies.

AKA Theatre

Support the **salary of our producing artistic director**. **Sustainability** objectives and activities she will be responsible for include managing operations and meeting strategic plan goals.

Measures:

1. To **maintain** AKA Theatre's standards of artistic and managerial excellence
2. To **increase paid attendance at mainstage shows** by 3 percent per year for each year of our grant
3. To **grow our board** from 5 to 7 members (an objective in our 5-Year Strategic Plan)

Your Turn

Worksheet Question 2

Data Collection

How much?

Quantitative

Quantitative data is evidence in the form of numbers – numerical indices that allow for **counting**, **ranking**, or **scaled** measurement.

- N = 372 (assemblies); 48.4% (Latino)
- 1st, 2nd, 3rd
- Strongly Disagree = 1 . . . Strongly Agree = 4

Collecting Quantitative Data

EASIER

- **Checklists**

- **Financial reports**

- **Program data**

  (number of events, products, participants)

- **Surveys**

  (scaled – Very Dissatisfied = 1 to Very Satisfied = 5)

HARDER

- **Tests and rubrics**

Analyzing Quantitative Data

- **Counting** or estimating numbers
- **Calculating** averages
- **Comparing** your numbers or levels with
  - Established targets
  - Previous projects
  - Similar organizations and projects

What kind?

Qualitative

Qualitative data is evidence largely in the form of **words** and **text** – quotes, narratives, and stories, as well as descriptions of images, artworks, performances, etc.

Collecting Qualitative Data

EASIER

- **Observations** (events, relationships, settings, participants, etc.)

- **Document review** (press clippings, letters and emails, meeting minutes, memos, files, etc.)

- **Artifact review** (artworks, artmaking materials)

- **Short-answer** survey items

- **Interviews** (in-person, phone, email)

- **Focus groups** (patrons, board, staff, artists, etc.)

HARDER

Analyzing Qualitative Data

- **Describe** and **illustrate** what happened
- **Compare** to targets and similar projects
- Interpret for **themes**, patterns, and meaning
- Look for **strengths** and **weaknesses**

AKA Music Education Program

Baseline:
Actual 2012/2013 bookings = 353

Baseline:
Musicians on roster in 2013 = 100

Target:
At **least 35 additional AKA events/year**, average 350 attendees per event total **additional served 12,250**

Target:
10 Additional Musicians with 5 years of performance experience for youth audiences

Target: :
At least 85% of teachers surveyed will report high levels of **satisfaction with the quality and relevance** of AKA assemblies.

AKA Music Education Program

- **Quantitative Data**
  - Booking records
  - Musician resumes (years experience)
  - Observation checklist (did the performer meet learning objectives)
  - Coordinator/ teacher feedback form (scaled responses)

- **Qualitative Data**
  - Open ended feedback (what did people think?)
  - Musician acclaim (reviews, press clippings)
  - Observation notes (what was the performance like? How did the students react?)

Feasibility

Quiz: Quant or Qual?

- Counting how many times people ask questions.
- Detailed, vivid descriptions of an event.
- 91,607
- Zip code 91607

Your Turn

Worksheet Question 3

Mini Panel Review

- Are the measures appropriate to the project goals?

- Are the data collection tasks appropriate to the measures?

- Is this plan feasible (given org size/capacity)?

- Suggest alternative collection methods. What would make the evidence more convincing?

PART II: OGP Report Questions

Answering the Questions
What Does the Data Say?

Year 1: Reporting on process and progress

Using the data you've collected and analyzed:

1. Discuss your **expected outcomes**, your **evaluation plan** and **approaches**, and your **measures of success**.

2. Report on your **progress** and **accomplishments to-date**, relative to your expected outcomes.

Year 1
Question 1:
EXPECTED PROJECT OUTCOMES

What do you hope to accomplish with the OGP project (expected outcomes)? What will show you that you're achieving those outcomes? Use both quantitative and qualitative measures.

Year 1
Question 2: PROJECT ACCOMPLISHMENTS

Describe what's happening in Year 1 of your OGP project in terms of the quantitative and qualitative ways described in Question 1. If applicable, please describe one or two challenges or obstacles . . . Describe how you plan to address these challenges . . . or if you have already addressed them . . . .

Year 1: Challenges & Obstacles

- If addressed and resolved,
  discuss *Implemented* NEW actions or activities.
- If you EXPECT to address and resolve,
  discuss *Planned* NEW actions or activities.
- If you need to change the direction of your OGP
  project by requesting a *Project Amendment* . . .

CALL NOW!

grants@arts.lacounty.gov or **(213) 202-5858**

Answering the Questions
What Does the Data Say?

Year 2: Reporting on outputs and outcomes

Using the data you've collected and analyzed:

1. Report on your **accomplishments** over the 2-year contract period.

2. Discuss the **overall impact** of the project on your organization and stakeholders and how it will inform ongoing initiatives and strategies.

Year 2
Question 1: PROJECT ACCOMPLISHMENTS

Describe what happened by the end of Year 2 in terms of the quantitative and qualitative measures you identified in your Year 1 Report. Did you achieve your outcomes as expected? Were there any unexpected outcomes? If applicable, discuss the outcomes of how you addressed challenges described in the Year 1 Report. Are there any new or persistent challenges?

Year 2
Question 2: IMPACT OF THE PROJECT

What was the impact of the OGP project on your organization as a whole? How does the OGP project inform future organizational or program planning or future OGP projects? What are some lessons learned from this experience, if any?

What if it didn't go so well?

Say so.

Using the **evidence** you've collected,

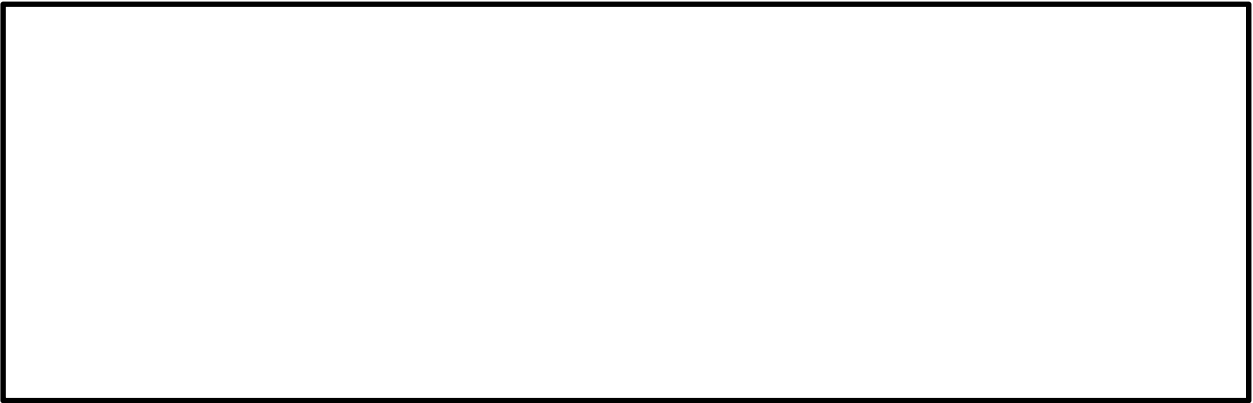describe **why** you think things fell apart.

Discuss what you're going to do better

next year or next time.

OGP Reporting 101 Workshop
April 7, 2016
Evaluating your Progress Worksheet

1. What are your project goals?

2. How will you measure your progress?

3. What data sources will you use? How will you analyze them?