

Arts Foundation of Western Oregon Fund
of the Oregon Community Foundation

HULT ENDOWMENT

POLICY GUIDELINES AND GRANT APPLICATION PROCEDURES

HISTORY

In the late 1970s, the Eugene Arts Foundation was established to attract and administer charitable gifts for the following purposes: to provide supplemental funds for the enhancement, equipment, renovation and program of the Hult Center for the Performing Arts, to maximize public use and enjoyment of the facility, and to provide all possible supplemental assistance to eligible arts organizations that serve the artistic needs of this community.

In recognition of the importance of Eugene's new performing arts center, not only for this community, but also for Lane County, and indeed, the entire State of Oregon, Jewel and Nils B. Hult and their family provided a major gift to aid its construction. In addition, they entered into a formal agreement with the Eugene Arts Foundation that established, with the pledge of a magnificent additional gift, the Nils and Jewel Hult Endowment Fund.

That agreement stipulated that earnings from the Hult Endowment are to be used primarily to encourage and aid the local production of performances in the Hult Center by persons and groups having national and international reputation and stature in the performing arts, as well as to support and assist local artists and groups.

To implement the Endowment, the Eugene Arts Foundation, in consultation with representatives of local performing arts groups and the Hult Center, established "Policy Guidelines" in January 1989 to govern the disposition of the income from the principal of the Hult Endowment Fund. The original "Policy Guidelines" were revised in January 1990, September 1998, July 2010, and July 2015. All eligible proposals will be assessed in accordance with those guidelines.

In July 1997 the Nils and Jewel Hult Endowment Fund was transferred to the Arts Foundation of Western Oregon Fund of the Oregon Community Foundation, which empowers the Hult Endowment Committee to determine eligibility and assess proposals from organizations seeking Hult Endowment support. Hult Endowment Committee recommendations are submitted to the Board of Directors of The Oregon Community Foundation for final approval.

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HULT ENDOWMENT POLICY GUIDELINES

NOTE FOR APPLICANTS SUBMITTING MULTIPLE PROPOSALS: As of 2018 only two applications per season per organization will be accepted, up to four applications in total per organization.

- A. **In General.** The merits of each individual proposal will be separately evaluated. Grants will be awarded at such times and in such amounts as the Hult Endowment Committee, in its discretion, determines. It is expected that at times certain policies will be promoted above others. The Hult Endowment Committee reserves the right to decline to award grant funds at any time for any reason. Decisions on awards are not final until approved by The Oregon Community Foundation's Board of Directors.
- B. **In Particular.** The following policies shall be advanced:
- I. Encourage and assist Hult Center productions by artists of national or international stature, particularly where those productions enrich or supplement programs offered by other local arts presenters, by:
 - a. Providing supplemental financial support for artists' fees, especially where such help is necessary to present the artist in Eugene. Before providing such assistance, the following factors will be carefully considered:
 - (1) How many members of the public will have the opportunity to see or hear the artist perform or present workshops.
 - (2) The effect of any such assistance on the availability of Hult Endowment income for other purposes during the year. As a general rule, significant amounts of the Endowment will not be used during a year for a single performance by an individual artist to the exclusion of support for its other purposes.
 - b. Providing funds to make extended stays possible of "star" performers through workshops and affiliated performances, such as master classes at the University of Oregon School of Music.
 - c. Providing funds to assist with marketing for the development of audiences and new constituencies, including children.

2. Encourage creative ideas by local arts organizations and the Hult Center for programming and audience development in the Hult, by:
 - a. Supporting innovative cooperative programming ventures by local arts presenters.
 - b. Providing seed money for pilot projects for audience development and projects directed toward developing an audience among children.
 - c. Providing funds for expanded activities associated with performances, such as:
 - (1) Workshops
 - (2) Short-term residencies for composers, performers, artists
 - (3) Children's concerts
 - (4) Pops concerts
 - (5) Related exhibitions
 - (6) Additional rehearsals as required by the challenging nature of the work.
 - (7) Additional performers or other extraordinary requirements of the work.
 - d. Commissioning original works for the performing arts, including musical, operatic and dance compositions, plays, and set designs.
 - e. Sponsoring world or U.S. premieres of artistically significant events.

In general, support will be given to events which take place in the Hult Center for the Performing Arts. It is possible that events may be funded that occur outside the Hult Center, but they must be designed in significant part to develop audiences at the Hult Center, such as the presentation of performances on tour in neighboring communities.

3. Encourage and support activities in the Hult Center by individual performing artists. Typically support will be provided to individual performing artists by supporting the performing arts organizations with which they have a contractual or employment relationship, or by supporting events that are promoted by the Hult Center that feature individual performing artists. (See Exhibit A for definitions).

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GRANT APPLICATION PROCEDURES

A. GRANT APPLICATIONS:

There is no fixed minimum or maximum with respect to the size of grants requested. Depending on the amount of grant money available, several smaller projects may take priority over one large project.

The Hult Endowment Committee will determine eligibility for funding and will review and assess preliminary and final proposals. The Hult Endowment Committee reserves the right to decline to award grant funds at any time for any reason. Decisions on awards are not final until approved by The Oregon Community Foundation's Board of Directors.

I. **Eligibility to apply for funding:**

Hult Endowment funding will be provided to organizations which:

- a. Have attained 501(c)(3) status.
- b. Have a minimum expense budget of \$200,000 and evidence of proper financial stewardship.
- c. Have audited financial statements.
- d. Are based in Lane County.
- e. Have at least two years of continual operation and have demonstrated a reasonable likelihood of continued performing activity.
- f. Represent traditional art forms and have demonstrated professional intent, as evidenced by artistic standards and artists' compensation.
- g. Use or appear likely to use the Hult Center for performances.
- h. Have demonstrated significant community impact that provides broadly-based and sizeable constituencies with regular professional quality artistic service programs.
- i. Have achieved a level of quality and proficiency sufficient to perform for critical review at the Hult Center.

II. Proposal submissions:

Hult Endowment proposals must be submitted through our online grant portal, using SlideRoom. This year, **the portal will open on August 24 and applications will be due by 11:59 PM on Friday, October 5, 2018.** Proposals will contain the following elements:

- a. A concise statement of the purpose of the request, the specific objectives and key activities, including any extraordinary requirements, that will be supported by the requested funds; the need for the project in the community; who will benefit from the project and how; and a description of the plan of action and a timetable for implementation.
- b. A statement on how the request addresses the Hult Endowment Policy Guidelines.
- c. A budget for the program including specific items the grant funds will be used to support; an indication of other prospective funding and the amount requested of each; a breakdown of projected ticket sales including expected, best and worst case sales estimates; a statement of the applicant's total budget and financial position (information used to support grant requests from the Silva Endowment may be submitted for this purpose).
- d. A timetable indicating when expenditures will be made.
- e. The identity and qualifications of the key personnel to be involved.
- f. A statement as to how and when results will be measured and reported to the Hult Endowment Committee.
- g. A list of members of the applicant's governing body.
- h. Evidence of tax-exempt status.
- i. A statement to the effect that the proposal has been reviewed by the applicant's governing body and specifically approved for submission to the Hult Endowment Committee.
- j. Optional supporting materials which may include audio/visual media samples to illustrate elements of the proposed project or featured artist.

Awards will not be final until approved by The Oregon Community Foundation's Board of Directors at their November meeting. Grant funds will not be disbursed until final narrative and financial reports are received and approved, unless special circumstances have been arranged with the committee.

B. RESTRICTIONS:

Hult Endowment funds may not be used for:

1. Endowment.
2. General fund drives or annual appeals.
3. Indirect or overhead costs, except as specifically related to a project.
4. Debt retirement or operational deficits.

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EXHIBIT A - DEFINITIONS

Qualified Performing Artists or Performing Arts Groups means those artists or groups engaged in the production and performance of traditional art forms who have achieved, or may reasonably be expected to achieve within one year, a level of quality and proficiency sufficient to perform for critical review at the Hult Center for the Performing Arts, and who meet the following additional criteria:

1. They shall have given reasonably frequent public performances during a period of at least two years.
2. They shall, in the judgment of the Hult Endowment Committee, have demonstrated a reasonable likelihood of continued performing activity.
3. They shall have demonstrated professional intent, as evidenced by artistic standards and level of compensation.

Local Performers means Qualified Performing Artists or Performing Arts Groups whose principal activities or offices have been in Lane County, Oregon, for at least two years.

Touring Performers means non-local Qualified Performing Artists or Performing Arts Groups who, have national or international reputation and stature in the performing arts.