



FILM ACTION OREGON FISCAL SPONSORSHIP GUIDELINES AND APPLICATION REQUIREMENTS

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MISSION STATEMENT

Film Action Oregon entertains, inspires, educates and connects our community through the art of film, while preserving the historic Hollywood Theatre and the world-class Movie Madness video collection. We offer a diverse array of film programming and initiatives that empower audiences to fully explore and participate in the rich cultural heritage of cinema.

Film Action Oregon dba Hollywood Theatre is a 501(c)(3) nonprofit offering fiscal sponsorship to approved Oregon-based film projects that both support the Hollywood Theatre's mission and are actively seeking project funding. The Hollywood Theatre has fiscally sponsored a variety of film projects since 2003, helping both established and emerging filmmakers create new, thoughtful work. The Hollywood Theatre also partners with film festivals and other educational programs to support their work.

WHAT IS THE FISCAL SPONSORSHIP PROGRAM?

Fiscal sponsorship is a formal financial and legal arrangement in which a 501(c)(3) non-profit business, in this case, the Hollywood Theatre (HT) establishes a grant relationship with an individual or group that is engaged in a project that did not originate with the HT, but nonetheless, furthers the mission of the HT.

Through this relationship, the legal and tax-exempt status of the HT is made available to the project for fundraising purposes. In a fiscal sponsorship relationship with the HT, the producers of a project can apply for grants and donations available only to non-profit entities without having to form a separate 501(c)(3) company.

WHAT ARE THE BENEFITS OF THE FISCAL SPONSORSHIP PROGRAM?

- **ABILITY TO RAISE FUNDS.** Upon acceptance of fiscal sponsorship by the HT, producers for the project may apply for grants available to nonprofit entities and solicit tax-deductible donations under the umbrella of the HTs non-profit status.
 - This additional fundraising ability opens doors to a multitude of granting opportunities, and provides an avenue for soliciting donations from individuals who are willing to give funding in exchange for a tax-deductible donation receipt.
 - As a Fiscal Sponsor, the HT does not take any ownership of the project, nor infringe on creative control, copyright, or in any way prevent future sales or profit from the project once the fiscal sponsorship relationship has concluded. The HT seeks to be as non-intrusive as possible in monitoring projects, while assuring that the funds raised are being properly disbursed and used for the project as intended. Sponsored projects are treated as separate legal entities that are responsible for their own tax returns, employment taxes, insurance, debts, liabilities and other legal obligations.
- **ACCESS TO THE HOLLYWOOD THEATRE.** All Sponsored Projects have free access to the HT for one event such as a fundraiser, cast and crew screening, or the premiere of the finished film.
 - Our fiscal sponsorship program is intended to support filmmakers who can demonstrate a proven history of projects that have been successfully distributed to a public audience. Projects that already have potential funding sources in place are encouraged to apply.

HOW DO I KNOW IF MY PROJECT IS ELIGIBLE FOR FISCAL SPONSORSHIP?

To be eligible for the HTs Fiscal Sponsorship Program:

- Your project must be considered a “non-commercial” work. That is to say, your project must be financed only by personal funds, donations, grants, corporate sponsorship, in-kind donations, etc. If your project is financed in any part by investors who seek a return on investment through profit participation, your project is not eligible for our program.
- Your project should fall into at least one of the following categories:
 - A documentary film
 - An experimental film
 - A fictional narrative film
 - A film festival
- Your project does not need to encompass end-to-end production. For example, projects that need only to secure funds for specific post-production efforts are eligible for fiscal sponsorship.
- You and/or your film production company must be located in the State of Oregon.
- While the subject matter of your project doesn’t need to be Oregon based, it must be in keeping with the mission of the HT.
- You must be a U.S. citizen with a social security number, or, have a production company with a U.S. Federal ID number.
- You must have a proven track record of producing film, or film festival projects.
- You must have a proven track record of fundraising for film, or film festival projects - or have identified potential sources of funding that are commensurate with the standards of the Fiscal Sponsorship Program. In either case, a realistic fundraising plan must be articulated.
- You must have access to, or a thoroughly detailed plan to apply for, funds that can only be obtained via a fiscal sponsorship relationship with an eligible 501(c)(3) non-profit.
- If you are a full-time student, you are not eligible for the Hollywood Theatre Fiscal Sponsorship Program.

HOW DO I APPLY FOR THE FISCAL SPONSORSHIP PROGRAM?

To apply, please submit a detailed project proposal that includes the following:

- **INTRODUCTION.** Please summarize your project in a few sentences.
- **FILM TREATMENT.** Please describe your plan to creatively express the material including. This should include, but is not limited to:

- *A director's statement.* Please tell us what is motivating you to produce your project and explain why there is a need for this project to be made.
- *A full summary.* Please expand on your project introduction and use roughly a page to tell us the story of your film.
- *Structure, visual style and format.* Please tell us what creative means you plan to use in order to best execute the story on film.
- **FUNDRAISING STRATEGY.** In as much detail as possible, please outline your plans to fundraise for your project. This should include, but is not limited to:
 - Your strategy to create awareness of your project for fundraising purposes.
 - The names of foundations, corporations and agencies that are familiar with your project and willing to donate funds provided that you have a binding fiscal sponsorship relationship in place.
 - The names of any other foundations, corporations and agencies that you plan to apply to for funding.
 - A detail of any funds you have already raised and the means by which you raised those funds.
 - A detail of individual donors you plan to approach for funds.
 - A description of other fundraising activities you plan to pursue.
- **DISTRIBUTION STRATEGY.** In as much detail as possible, please outline your plans to connect your project to an audience. This should include, but is not limited to:
 - The primary audience for your project and why they will benefit from it.
 - Your strategy to create awareness of your project with its primary audience.
 - The names of film festivals, specific exhibition venues, film sales and/or distribution companies that you plan to approach.
 - A short explanation of why each of these is key to your larger distribution strategy and how they will help your project reach its primary audience.
- **HISTORY OF PAST PROJECTS.** Please provide examples of film or film festival projects that you have created. This should include, but is not limited to:
 - Projects which you and/or your production company successfully originated, funded, and completed.
 - Projects which you and/or your distribution partners successfully reached your target audience.
 - Any relevant website links that further demonstrate your ability to create, fund, and distribute a film project. These can include, but are not limited to portfolio websites, project specific websites, existing press coverage and/or foundations/organizations that are supporting your project.
- **PROJECT BUDGET.** Please attach a budget for your film, including pre-production, production, and post-production. This should include, but is not limited to:
 - Total budget of the project.
 - Amount of the total budget that you're looking to obtain through fundraising.

- A detailed budget of the portion of the work that you're hoping to fund. For instance, if your film is already shot and you're hoping to raise post-production funds, please detail your post production budget.
- **PERSONNEL BIOGRAPHIES.** Please list all primary crew and supply a biography of each listed crew member. This should include highly qualified crew positions such as:
 - Producer(s)
 - Director(s)
 - Screenwriter(s)
 - Production Designer(s)
 - Cinematographer(s)
 - Editor(s)
- **REFERENCES.** Please submit contact information for two professional references. Ideally, these references should be able to speak to your ability to successfully originate, fund, and complete a film project.
- **SAMPLE WORK.** If possible, please submit a work-in-progress sample of your proposed project. Suggested samples include, but are not limited to:
 - A teaser or story trailer
 - A rough cut
 - An edited scene

If you do not yet have a sample of the project you are proposing, please submit a sample of your previous film work. Ideally, your sample will relate stylistically or thematically to your proposed project. Please include a short written statement explaining how the sample of your previous film work relates to your project proposal.

HOW DO I SUBMIT MY APPLICATION?

Please complete [this cover sheet](#) and include it with your project proposal. Then, email your completed application materials to:

fiscalsponsorship@hollywoodtheatre.org

Please allow up to four (4) weeks for a response. If you have questions regarding the eligibility of your project or the application process, please contact us at the above email address.

WHAT HAPPENS WHEN MY PROJECT IS ACCEPTED?

If your Fiscal Sponsorship Program application is accepted, the HT will become the sponsored project's exclusive fiscal sponsor for the duration of the project. [You'll fill out and sign this agreement](#), which essentially acts as the contract between you and the HT for the duration of

your project. Once this agreement has been fully executed and your project is recognized as a legal non-profit, you'll be able to:

- Apply for grant funding and receive grant funds in the event of a successful application
- Receive development consultation on grant applications that you're writing
- Solicit individual monetary and/or in-kind donations
- Inform donors that all donations made to your project are tax deductible
- Provide your donors with tax deductible receipts
- Book a screening of your project in one of our auditoriums, for example, a cast & crew screening or premiere screening

Though your project will be considered a legal non-profit under the larger HT non-profit umbrella, all rights, title and interest in the project remain with the project producer. Similarly, full creative control of the project will always remain with the project producer.

The HT does not provide the following services as part of the Fiscal Sponsorship Program:

- Creative consultation and/or feedback during pre-production, production, or post-production phases
- Consultation and/or insight regarding film festivals, film sales, or film distribution

ARE THERE FEES THAT I SHOULD BE AWARE OF?

In order to cover the financial overhead of running the Fiscal Sponsorship Program, the HT charges an administrative fee based on the total amount of the grant and/or donation received. This fee is determined as a percentage of the total grant and/or donation and is based on a sliding scale:

- 6% of contributions between \$1 and \$150,000
- 5% of contributions between \$150,000 and \$400,000
- 4% of contributions between \$400,000 and \$600,000
- 3% of contributions over \$600,000

This fee is applied to each disbursement check that the HT sends you. Wherever possible, this administrative fee should be factored into your project budget.

Though we'll require you to assign a dollar value and report on each in-kind donation that your project receives, the HT will not charge an administrative fee for in-kind donations. The administrative fee will be charged based on the total value of financial grants and/or donations received in a fiscal year.

HOW ARE GRANTS AND/OR DONATIONS PROCESSED THROUGH THE HOLLYWOOD THEATRE?

The process for notification and disbursement of grant and/or donation funds varies depending on the specific organization and/or donor. However, the order of operations described below details the process that the HT is most familiar with.

- The HT is notified of a grant or donation award for a specific project. Typically, this includes the amount of the grant or donation, and an estimated date for the funds to be dispersed to the HT.
- Grant and/or donation funds are deposited into the HT's bank account.
- Once the transaction has cleared our accounting department, the HT will issue a check to the project producer. An administration fee will be applied to the total disbursement according to the fee structure detailed above. This process can take up to 10 business days.
 - Please note, if donations are made via credit card, additional fees may apply.
- If a donor contributes by check, a copy of the donor check will be provided to you for your records.
- In accordance with IRS regulations, for donations of \$250 or more, the HT will provide the donor with a letter confirming that their tax-deductible donation was received.
- Best practices suggest the project producer contact contributors directly with thank-you notes and keep them in your project files for reference.

WHAT ARE MY REPORTING RESPONSIBILITIES TO FUNDING ORGANIZATIONS?

By entering into a fiscal sponsorship agreement with the HT, you're agreeing to represent the HT to funding organizations in a way that will not damage our relationship with these organizations.

- If a funding organization provides your project with a contribution through the Hollywood Theatre Fiscal Sponsorship Program, in most cases, that funding organization will require a report detailing how the contribution was utilized.
- Each funding organization may have different reporting requirements. It is your responsibility as the producer of your project to be aware of and execute on all reporting requirements.
- Reporting deadlines are set by the funding organization. It is your responsibility as the producer of your project to be aware of reporting deadlines, and to prepare and submit your reports fully and on time.
- A copy of financial report(s) submitted to funding organizations must also be submitted to the HT.

- In some cases, a funding organization may require that a financial report be submitted directly from the HT. In such cases, please submit two original copies to the HT. The HT will then submit one original copy to the funding organization on behalf of your project, and keep the other for our records.
 - Please submit your copies to the HT *at least* two weeks ahead of the reporting deadline as in these cases, the HT will bear the responsibility of submitting the report by the stated deadline.
- The HT, as the fiscal sponsor of your project, is accountable to any funding organization that provides funds and/or in-kind donations to your project. If a funding organization specifies requirements for the use of funds, it is expected that you, as the producer of the project, will abide by those funding requirements. This includes, but is not limited to, reporting requirements.
- Should a funding organization determine that your project has not met the stated requirements for use of their funds, in most cases, the funding organization will require that their funds be returned in full. If this happens, the producer will be required to return the funds in full and the fiscal sponsorship relationship will be terminated.

WHAT ARE MY REPORTING RESPONSIBILITIES TO THE HOLLYWOOD THEATRE?

All fiscally sponsored projects are required to submit project status reports to the HT. The HT provides [this report template](#) that can be used for either film projects, or, for film festival projects.

If your project is a film, then for the duration of your project, you'll be expected to provide (2) two status reports per year based on this schedule:

- Due by July 15: Mid-year status report covering the period between January 1 - June 30.
- Due by January 15: Year-end status report covering the period between January 1 - December 31.

If your project is a film festival, then for the duration of your project, you'll be expected to provide (1) status report per year based on the date that your event concludes:

- Due by July 15: If your event concludes between January 1 - June 30.
- Due by January 15: If your event concludes between July 1 - December 31.

The project producer will be asked to provide the following information:

- Project title
- Reporting period date
- Current phase of project (pre-production, production, post-production)
- Expected end date of project
- Current project budget for reporting period (including income and expenses)
- Total amount producer has raised for project to date
- Amount producer has raised to date administered through the Hollywood Theatre Fiscal Sponsorship Program

- Amount Producer has raised to date not administered through Hollywood Theatre Fiscal Sponsorship Program
- Amount of funding producer still needs to raise to complete project
- Amount of funding still needed to be raised in order for project to be completed
- Confirmation that project still requires fiscal sponsorship
- Current contact info (email and mailing address)
- A list of name(s) of funding organizations and/or individuals who have provided funding, and the amount, to date.

All reports must be kept up to date and submitted on time to keep the fiscal sponsorship active.

WHAT ARE MY TAX REPORTING RESPONSIBILITIES?

The producer is responsible for maintaining their own financial records. The HT will send the project producer a 1099 form each year for the duration of the project if the donated revenue exceeds \$600. The producer is responsible for maintaining proper tax records should The HT be required to provide any such records to tax authorities in the event of an audit. It is highly recommended that producers consult a tax advisor concerning participation in the program.

ARE THERE FUNDRAISING GOALS THAT MUST BE MET IN ORDER TO MAINTAIN MY ELIGIBILITY?

Yes. All projects must raise at least 10% of their total proposed budget in each fiscal year.

WILL THE HOLLYWOOD THEATRE PROVIDE ANY TYPE OF CONSULTATION?

The HT Development Team will provide grant consultation as part of the Fiscal Sponsorship Program. *However, that consultation must be arranged well in advance of grant submission deadlines.*

The HT will not provide creative consultation on your project.

If your project is a film festival, the HT will not provide film programming consultation. Your film festival should be the result of your creative vision and the HT is simply providing access to our non-profit umbrella in order for you to raise funds.

If your project is a film, the HT will not provide creative consultation on your film during any phase of production. Upon the completion of your film, the HT will not provide consultation on film festival submission, marketing, or distribution strategy.



THE FINE PRINT

YOUR PROJECT MAY BE INELIGIBLE FOR SOME GRANT FUNDING. As a non-profit, the Hollywood Theatre applies for funding from both local and national funding organizations. To that end, you won't be able to solicit funding from sources where the HT has other proposals pending without the HT's express approval. If you are unsure of whether or not a fundraising source has an existing proposal from the HT, please contact us to confirm.

ALL GRANT APPLICATIONS MUST BE REVIEWED BY THE HOLLYWOOD THEATRE BEFORE FINAL SUBMISSION. There are a few reasons for this requirement. First, the Hollywood Theatre has existing relationships with many funding organizations and may be able to offer useful advice on your application in order to strengthen your case for funding. Next, per above, the Hollywood Theatre will confirm that there are no other grant applications that would result in a conflict of interest. Finally, as your project is an extension of the mission of the Hollywood Theatre, we reserve the right to review your grant application materials to ensure that our mission is properly represented.

BOOKING YOUR SCREENING EVENT AT THE HOLLYWOOD THEATRE. Keep in mind that booking a screening of your project in one of our auditoriums must be done well in advance of the date that you're looking to book. We typically book events 5-6 months out as our exhibition schedule fills up very quickly. While we are happy to work with you to book your screening event, no preference will be given to Fiscally Sponsored Projects for bookings over any other films and/or events. For this reason, the more lead time you give the Hollywood Theatre to book your event, the better.