

The House Artists Program supports artists and companies by offering a suite of financial, outreach, and facilities services. The curated artist roster includes a set of creators, performance companies, and organizations whose creative vision aligns with that of CounterPulse. Together we work to nurture risk-taking, assumption-shattering art of, by, and for diverse communities.

This comprehensive program serves as a nesting place and launching pad for artists. We provide the home base for these artists and advocate for their work to increase the range of their reach. Robust fiscal oversight is at the core of the program to provide the solid foundation on which to build creative work. CounterPulse is committed to supporting the development of our House artists by connecting them with our community and expanding the reach of their work to new audiences, presenters, and arts professionals. Further, we make accessible ongoing rehearsal space to facilitate regular practice.

The program offers the following services:

- **Financial:** CounterPulse offers a range of fiscal services including: check writing; receiving donations, grants and earned income; tracking and issuing 1099's; tax-deductible donation acknowledgement; affordable liability insurance for approved events; quarterly financial statements, as well as financial and budgeting consultation, and support with administrative functions of grant applications. In order to further support fiscally sponsored artists in managing the nuances of their individual finances, CounterPulse provides distinct workbooks composed of an array of tools such as a budget template and grant tracker. Artists are expected to utilize these tools to project and report income and expenses associated with projects managed through CounterPulse.
- **Outreach:** CounterPulse amplifies visibility of fiscally sponsored artists and their projects by including content about their work on CounterPulse's website and in email announcements. It is the organization's desire to explore additional outreach partnerships, potentially engineered in collaboration with the artist. When possible, staff will attend the fiscally sponsored artists' events, and work to spread word-of-mouth on current project activities.
- **Facilities:** House Artists receive 5hr/month of free rehearsal time at CounterPulse during non-peak hours (M-F 10am-6pm), as well as member discount rates on additional rehearsal time. In an effort to avoid unexpected rental charges, artists should track their rehearsal time in the "Rehearsal Log" tab of their individually provided workbook, described above in the financial section.

## Overview

- **INCOME:** CounterPulse can receive contributed and earned income on behalf of your organization, whether by check, credit card, cash or other forms of payment. Forms for depositing income are located on CounterPulse's website. All income is deposited and attributed to the House Artist's account within two weeks of receiving the appropriate documentation, including documentation in House Artists' receivable tab in their individual workbooks. Information on receiving income is detailed further in this document.
- **EXPENSES:** Your funds can be withdrawn by one of three methods: providing CounterPulse with an invoice, reimbursement request, or per diem request. Forms to support withdrawal of funds by all three of these methods are located on CounterPulse's website, and checks are cut within two weeks of receiving the appropriate paperwork. Information on withdrawing funds is detailed further in this document.
- **FINANCE STATEMENTS:** Each House Artist will receive an automatically generated profit and loss report within two weeks of the end of each quarter. Artists can expect these reports within the first couple of weeks within September, January, April, and July. The quarterly P&L will include all income received, funds withdrawn during the period, as well as a balance sheet. House Artists are entitled to request a current balance at any time, however it is expected that each artist is proactively tracking their own expenses to adhere to projects' projected expenses (please use budget template we've provided in your spreadsheet). Allow 10 business days for such requests to be fulfilled. You will receive an email when either quarterly or individually requested financial reports have been generated. These documents will be uploaded and rendered fully accessible to each artist in their individual CounterPulse folders.
- **CONTRACT & ANNUAL REPORT:** Your contract will be up for renewal at the end of each fiscal year. We will notify you when it is time to sign your renewal each June. At that time, you will also need you to fill out a [simple report](#) on your activities for the past year. We share this information with our funders and community. This report is due by July 31st.
- **ANNUAL MEETING:** In January we will meet with all of the House Artists to enjoy some food, wine and conversation. This is an opportunity to learn about each House Artist's activities for the year, begin to brainstorm CounterPulse's outreach activities, and advise on possible grant opportunities.

- **REQUIRED ACKNOWLEDGEMENT:** Include the following language in printed and digital materials, such as posters, postcards, press releases, as well as in performance programs: CounterPulse’s support by including our logo and the following information on your printed media: **(Name of Project) is a project of CounterPulse’s House Artist Program. EX: “Eye Zen’s *Out of Site*, is a project of CounterPulse’s House Artist program.**

### Income

CounterPulse can receive contributed and earned income on behalf of your organization, whether by check, credit card, cash or other forms of payment. Forms for depositing income are located on CounterPulse’s website, and all income is deposited and attributed within two weeks of receiving the appropriate paperwork.

**Donations:** As a House Artist of CounterPulse, you are able to solicit tax-deductible monetary and in-kind donations. House Artists need to stay diligent about recording impending payments in the receivables tab of their individual House Artist Workbooks. Observance of this policy is necessary in order to accurately attribute House Artists’ payments from those of CounterPulse. Lack of compliance with this policy will create a delay in proper attribution of funds.

- **Acknowledgement:** For all eligible donations, we send a letter of acknowledgement to the donor which can be used for tax-deduction purposes by the donor. However, we highly encourage you to also send a personal thank you note to your donors. We will send you a reminder when a donation occurs, but again it is up to you to send a personal thank you note.
- **Fees:** CounterPulse retains a 10% administrative fee on contributed income to cover the costs of managing funds. For transactions that incur third party fees such as processing credit cards or PayPal, there is an additional 2.5% fee to cover those expenses.
- **Check Donations:** Checks should be sent directly to CounterPulse with a note in the memo field with House Artist name. Checks must be made out to CounterPulse (with House Artist and Project name in the memo field). We recommend the following language:

“Please make your tax-deductible donations payable to our fiscal sponsor—CounterPulse— with (your project’s name) in the memo field and mail to (YOUR mailing address, not CounterPulse).”

- **Cash Donations:** Cash donations must be received directly by you and then submitted to CounterPulse with a Cash Deposit form. We strongly recommend you submit any cash donations in person rather than mailing cash to CounterPulse.
- **Online Donations via CounterPulse.org:** Donors can make a donation to your project at <https://counterpulse.secure.force.com/donate?dfid=a0ni00000011dT2AAI>. These donations are subject to the 2.5% credit card fee above and beyond the 10% fiscal sponsor fee noted in the fees section above.
- **In-Kind Donations:** Donors can receive acknowledgement from CounterPulse for donated goods used by the project for the purposes of their non-profit activity. Please note that donated time & services do not qualify as tax deductible by the IRS. Projects can fill out the In Kind Donation Acknowledgment Request form for in-kind donations.
- **Fundraising Letters:** CounterPulse must approve fundraising letters and other materials used for soliciting donations at least 10 business days prior to use. Email your draft to [nicky@counterpulse.org](mailto:nicky@counterpulse.org). We recommend that you solicit individual donations at your events and through a yearly campaign letter to your supporters.

### Auctions

For auction items to be considered tax-deductible and to deposit those funds to CounterPulse, you are required to meet with CounterPulse staff to discuss the rules that govern auctions for 501c3 organizations and agree to abide by the current IRS rules. This allows all auction purchases, over the market value of the item, to be considered tax-deductible.

- **Information for Item Donors:** Current law limits a donor's charitable deduction to the original purchase value of the contribution, and does not permit the donor to claim a fair market value charitable deduction.
- **Information for Bidders:** Guests who purchase items at a charity auction ("Highest Bidder") may claim a charitable contribution deduction for the excess of the purchase price paid for an item over its fair market value. For example, a bottle of wine is valued at \$50 and the bidder wins the final bid for \$75, they could then claim \$25 as a donation. The bidder must be able to show, however, that he or she knew that the value of the item was less than the amount paid. For example, the auctioneer can list the value of the item on the silent auction bid sheet, providing a good faith estimate of the item available for bidding.

## **Raffles**

CounterPulse **does not** permit House Artists to use our name/nonprofit status to conduct raffles as a fundraiser. The state of California considers raffles a form of gambling and requires a permit to hold official raffles. A project can independently apply for a permit to hold a raffle but CounterPulse will ONLY accept an aggregate of these funds (one check from the artist/project) and these funds must be deposited as earned income.

If you would like to hold a raffle-like activity for your project, we encourage you to contact us to discuss options that are not considered gambling.

**Earned Income:** Projects can choose to deposit earned income with CounterPulse.

- **Fees:** Because of the reduced oversight, CounterPulse only retains a 2.5% administrative fee. For transactions that incur third party fees such as credit cards or electronic transfers, there is an additional 2.5% fee to cover those expenses.
- **Checks:** Checks should be sent directly to you (not to CounterPulse) and must be made out to CounterPulse with the Project name in the memo field, otherwise our bank cannot accept them. If the Project is not clearly stated in the memo field, the donation will be assumed to be directly for CounterPulse.
- **Electronic Transfers or Credit Card:** Please contact Tomas Riley ([tomas@counterpulse.org](mailto:tomas@counterpulse.org)) at CounterPulse in order to receive earned income via electronic transfer or credit card.

**Grants:** CounterPulse administers all grants received, and retains a 10% administrative fee to cover the costs of managing funds.

- **10 business days before a deadline:** When you plan to submit any grant application, **CounterPulse must be notified at least 10 business days prior to a grant deadline.** At that time, inform our staff what materials are required from the funder for the proposal. If we have not been given at least 14 days notice, we may not have sufficient time to gather the appropriate materials.
- **10 days before a deadline:** If you would like feedback on your application, you may submit a draft of the application at least 10 days prior to the deadline.

- **2 days before a deadline:** Your final grant application must be submitted to CounterPulse for final approval no later than two full business day before the grant is due. **We strongly encourage you to submit your final application sooner, in case we catch errors which must be addressed prior to submitting.** Your final application will be kept on file as reference should we need to discuss your application with the potential funder.
- **The day before a deadline:** Once a final copy of the proposal narrative and budget has been approved, CounterPulse will provide any additional materials that are required. Examples of this are: a current copy of CounterPulse's 501c3 letter, audited financial statements, signed letters stating that we are the fiscal sponsor and approve of the proposed project.
- **Once funded:** CounterPulse will request an outline of your projected expenses so we can provide accurate oversee your grant funds. We will also work with you to complete all contracts, reports and requests for reimbursement from the funder.
- **IMPORTANT:** Please forward all award letters, as well as any communication from funders giving notice that money is on the way, to the House Artist project manager, Nicky. This action supports CounterPulse in accurately identifying deposits and attributing money to House Artists' accounts in a timely manner. Several House Artists, as well as CounterPulse as an organization receive funding from the same Government and Foundation entities, making this step an important part of the fiscal sponsorship process.

## Withdrawing Funds

House Artists may request funds be withdrawn from their account to cover expenses associated with sponsored projects. Some expenses include but are limited to, artist fees, venue rental, as well as other production fees. Funds are withdrawn by one of three methods: through the submission of invoices, requests for reimbursements, or per diem agreements. All requests must be accompanied by the appropriate documentation and submitted to the Program Manager. Please allow 10 business days from the date your request is submitted for CounterPulse to process a payment. **House Artists should submit requests by Monday morning for CounterPulse to produce a check by the following Friday.** It is important to indicate method of delivery on the Cover Forms provided below. Checks will be sent out every Friday unless an artist indicates preference to pick up their check in person. If the Program

Manager does not receive all of the necessary support documentation upon receipt, or changes are made to the original request, expect a delay in delivery of your payment.

All Requests for payment by House Artists should be sent directly to Nicky Martinez, Program Manager at [nicky@counterpulse.org](mailto:nicky@counterpulse.org).

- All requests for payment must include a [House Artist Invoice](#) with all related fields filled with as much detail as possible describing the description of the expense, accurate mailing address and phone number, as well as a current W9. As required by law, those individuals who are not incorporated and receive \$600 or more in fees per calendar year will be issued an IRS Form 1099 from CounterPulse.
- Projects that would like to be paid directly must submit an invoice either under an individual's social security number or under a federal tax ID. These funds are considered taxable income.

### Reimbursements

Similarly, projects may be reimbursed for related expenses through submission of a [Request for Reimbursement](#) form accompanied by original paid receipts or invoices for all reimbursements.

- Original receipts and invoices must indicate how the expenses were paid (cash, check, credit card). Just the word "paid" is not sufficient.
- If it is not possible to submit an original receipt or an invoice indicating proof of payment as well as payment method, then a copy of the cleared check or credit card statement provided by the bank demonstrating proof of payment is alternatively sufficient.
- Just a reminder: Reimbursement checks are not considered taxable income.

### Per Diems

A per diem is the allowance paid for meals and incidental expenses. The House Artists must submit [Request for Per Diem](#) to the project manager listed above, and make arrangements for this type of payment for themselves or creative collaborators **PRIOR TO THEIR TRAVEL**.

- Before submitting paperwork, you will need to calculate the appropriate per diem amounts. The General Services Administration establishes rates for destinations within the Continental United States (<http://www.gsa.gov/portal/content/104877>). The Department of Defense establishes non-foreign rates including Alaska, Hawaii, Puerto

Rico, and Guam (<https://secureapp2.hqda.pentagon.mil/perdiem/>). The State Department establishes foreign rates (<http://www.state.gov/m/a/als/prdm/>).

- You will need to fill out a Per Diem Request form for each individual disbursement.
- We will issue a check after confirming the correct per diem based on the timeframe and location.
- For any expenses covered by the per diem that cost over \$75, you must provide a receipt to CounterPulse within two weeks of returning from travel.

## Requesting a 501c3 Letter

There are times when an organization or donor will request a copy of CounterPulse's 501c3 letter or our Federal Tax Identification Number. **When submitting a request, please 10 business days for CounterPulse staff to process. Some common examples include:**

- When approaching an organization such as Rainbow Grocery for donations for a benefit, they may request this information in a letter from CounterPulse.
- If you have asked a company to pay your artist fee directly to CounterPulse, they may need this information for a W-4 form.
- A donor would like to make a matching donation and they need our Tax Identification Number for the application.

For these requests we will need the following information:

- Name & Address of the organization/donor requesting the information
- Contact Person for the organization (Name, phone number & email)
- Details of reason for requesting a letter.

For requests related to soliciting donated items [food, wine, goods, etc], CounterPulse will also need the following information:

- Information about how donated items will be used.

- The name and contact information for the person that the donor should contact regarding questions about donations to your dance project.
- The dates, location, type of event and other pertinent information regarding the benefit event or performance that the donated items will be used at. If the donations will be used for a benefit event to raise funds for a performance, please include the dates and information for both the benefit as well as the performances.

Please send the relevant information to Nicky Martinez ([nicky@counterpulse.org](mailto:nicky@counterpulse.org)).

Once we have the above information, we will send a letter to you or to the potential donor directly, providing proof of nonprofit status.

## **Liability Insurance**

You have access to CounterPulse liability insurance for approved events.

Liability insurance covers the space and audience attending an event/performance. The policy covers negligence—it does not cover the dancers or other performers (unless there is an issue of negligence). As with all policies there are limits on each occurrence (\$1 million) and medical expense paid out to each person (\$10,000 any one person).

### **To Request Liability Insurance**

Please allow at least two full weeks for the review and process of your written request (email is fine), which must include the following information ([Refer to Insurance Request Document](#)): title and description of the event, date(s) of the performance/event (be sure to include the dates you will be at that theater/location including load in and load out days.), additionally insured (this is normally the venue name) and address, city, state and zip code, contact person at the venue with phone and fax number. When emailing this request please download the document in a Word Document to fill out and send as an attachment.

A \$90 administrative fee is required to be submitted to CounterPulse upon approval of coverage. Depending on performance variables, such as whether or not an ABC license will be needed for the event (liquor consumption), audience size, etc, an additional fee may be required as these types of variables require CounterPulse to purchase additional coverage in the form of

special event liability. Not all requests for liability coverage can be approved so House Artists must plan ahead in the event alternative arrangements for coverage need to be made.

Send this information or questions to Nicky Martinez ([nicky@counterpulse.org](mailto:nicky@counterpulse.org))

## **Rehearsing and Producing at CounterPulse**

House Artists may request up to 5 hours per month of free studio time at CounterPulse.

- Free hours may only be used during non-peak hours: Monday-Friday before 6pm.
- You can submit requests no earlier than the 21st of the month prior. For example, you may submit your request for free hours in January starting December 21st.
- All requests must be emailed to [nicky@counterpulse.org](mailto:nicky@counterpulse.org) answering these questions:
  - What date and times? For whom? And what Space?
- Artists who wish to schedule more than 5 hours in the space receive the member discounted rate for all additional hours and a formal REX invoice will be made to you.
- Free hours **do not** accumulate between months.
- While we don't foresee this happening, in rare circumstances we may need to work with you to reschedule hours that have already been booked. We will provide as much notice as possible.

Send all rehearsal requests or questions to Nicky Martinez ([nicky@counterpulse.org](mailto:nicky@counterpulse.org)).

House Artists producing events at CounterPulse have the fiscal sponsor fee on ticket sales waived.