

KEEPING SPACE - OAKLAND Program Guidelines

Community Arts Stabilization Trust (CAST) announces the availability of technical and financial assistance for Oakland arts and culture organizations that are facing displacement. *Keeping Space - Oakland* is a one-time pilot program comprised of real estate readiness training, one-on-one technical assistance, and direct financial assistance in the form of grants. The program aims to build the capacity of the arts and culture sector to be “real estate ready” and to mitigate the adverse impacts of displacement for arts and culture organizations in Oakland.

Keeping Space - Oakland facilitates **the securing of arts and culture workspaces** that enable existing organizations to remain and thrive in Oakland in the following ways:

1. **Increasing knowledge** of arts and culture organizations about strategies and resources that will strengthen an organization’s capacity to secure affordable, stable, and sustainable workspaces.
2. **Building skills and developing strategies** to tackle real estate projects, such as achieving optimal lease terms, crafting space sharing agreements, and site acquisitions, along with providing tools and templates that can be tailored to meet individual organizational needs.
3. **Providing financial support** to help execute real estate transactions that result in securing long-term, affordable space.

The program is modeled on San Francisco’s Nonprofit Displacement Mitigation Program for Arts and Culture, conducted by CAST and Northern California Community Loan Fund (NCCLF).

About CAST:

Community Arts Stabilization Trust was founded on the belief that the arts drive strong, vibrant, and diverse communities. When arts organizations have stable homes, protected from a volatile real estate market, they are free to be the trailblazers that make the San Francisco Bay Area a global hub of innovation and creativity. In economically diverse neighborhoods like the Tenderloin and East Oakland, community arts organizations act as a connecting point for people of different economic and cultural backgrounds to understand and bridge their differences through participation in the arts.

Founded in 2013, CAST is a nonprofit that creates long-term solutions to acquire, develop and provide affordable workspaces for artists and arts organizations. Bringing together technical assistance, real estate expertise, and innovative financing vehicles, CAST leverages public-private sector partnerships to execute its mission and goals.

KEEPING SPACE - OAKLAND is funded by:



KEEPING SPACE - OAKLAND is made possible in collaboration with the Oakland Arts Workspace Group and in partnership with the City of Oakland and Northern California Community Loan Fund.

Applications and guidelines are available at cast-sf.org.

For more information, please contact Tyese Wortham, Program Manager, Community Arts Stabilization Fund, 70 Otis Street, San Francisco, CA 94605, 415-556-9888, ext. 103, twortham@cast-sf.org.

Keeping Space - Oakland Timeline & Key Dates

December 7, 2016	<i>Keeping Space - Oakland</i> Applications Open Apply online at cast-sf.org .
January 9 - February 3, 2017	Application Information Sessions - TBA (visit cast-sf.org for locations, dates, and times)
February 10, 2017, 11:59 p.m.	Technical and Financial Assistance Applications Due
Spring 2017	Award announcements and notifications

Basic Eligibility Requirements

You must meet the following basic eligibility requirements to apply for *Keeping Space - Oakland* programs.

1. Mission statement must be clearly focused on the development, production, and/or presentation of arts and culture programs or on providing services to arts organizations
2. Must be “facing permanent displacement”. **“Facing permanent displacement” occurs when leases held by organizations are terminated, not renewed, or offered at market rate lease pricing, which is substantially more than what their current rent has been. Organizations on a month-to-month lease, with a lease expiring within the next 12-18 months, that lack site control, and that are encountering other conditions, which place the organization at imminent risk of losing office/programming space, are also considered to be “facing permanent displacement”. Organizations that may be temporarily displaced due to building renovations and have a right to return at their current/affordable lease rate are ineligible to apply.**
3. Must be incorporated and in good standing as a Section 501(c)(3) corporation or be a fiscally sponsored project of a tax-exempt corporation that is operating for purposes consistent with Section 501(c)(3) status
4. Must be located in the City of Oakland
5. Must demonstrate a stable, active, and continued presence in Oakland for the past three years

An organization could receive both technical and financial assistance.

Technical Assistance

Keeping Space - Oakland provides a cohort of six to eight arts organizations a three-part Real Estate Readiness workshop series and one-on-one consulting services. It is targeted for organizations most at-risk of displacement over the next 12-18 months. This includes organizations experiencing one of the following conditions:

- Lease will expire in the next 12-18 months
- On a month-to-month lease
- Displaced but have not yet secured a new stable site (lack of site control)
- Encountering other conditions that place the organization at imminent risk of losing office/programming space.

Technical assistance services will include financial planning, space planning, identifying/evaluating potential sites, negotiating leases or purchase agreements, developing construction budgets and project timelines, and analyzing potential funding sources, and will be conducted by real estate consulting experts at NCCLF.

Please note that two leadership representatives—one Board member and one senior staff—must be available to attend all three Real Estate Readiness workshops over the following weeks, if awarded: May 1-5, June 5-9, July 10-14*.

Technical assistance award recipients may be eligible to apply for financial assistance, once site control is secured. Please refer to the financial assistance program requirements below for more information.

Technical Assistance Program Requirements

In order to receive a technical assistance award, the applicant must submit the following documentation to demonstrate:

1. Risk of displacement over the next 12-18 months (since November 30, 2016) by submitting a current lease, documentation of month-to-month lease status, and any other documentation which clearly indicates risk of displacement.
2. Readiness to engage in the technical assistance program by submitting the contact information for one Board member and one senior staff who will be required to attend all three Real Estate Readiness workshops that will take place over the following weeks: May 1-5, June 5-9, July 10-14*.
3. Financial stability over the previous three consecutive years by submitting year-end financial statements or the most recent Data Arts report (formerly the California Cultural Data Project), and most recent tax year Form 990 (for 501(c)(3) organizations only), and most recent audit, if available.
4. Organizational capacity by submitting leadership resumes and/or biographies, and, if available, a strategic or business plan.
5. An established track record of serving the residents of the City of Oakland by providing at least three events or programs produced in Oakland over the past three years.
6. A track record of artistic and/or programmatic excellence and quality delivery of programs and/or services by submitting up to three recent press critiques/reviews—not previews—covering local work and attesting to the quality and rigor of your programs, and, if available, a letter of support from a participating community member, audience, artist served, or funder/donor that can speak to artistic and programmatic excellence.

*Please check the CAST website at cast-sf.org for the confirmed Real Estate Readiness workshop dates.

Financial Assistance

Keeping Space – Oakland provides grant funding of up to \$75,000 to organizations that have a developed plan for securing long-term or permanent, affordable workspace. This includes organizations with terminated leases that triggered displacement and relocation since July 30, 2016, or that have renewed leases at substantially higher rates.

Organizations can apply directly to the financial assistance component—without applying for and participating in the technical assistance component—provided site control has been secured with a minimum 5-year lease.

Financial assistance grant awards may be used for the following eligible expenses:

- Professional services (architectural, engineering, legal, etc.)
- Rent stipend (up to six months of the difference between prior and new rent amounts)
- Moving expenses
- Holding costs
- Tenant improvements¹
- Furnishings, fixtures, and equipment

Only one financial assistance grant may be awarded per real estate project for the applicant organization over the pilot period.

Technical assistance may be provided during the grant term (ending spring 2018) to ensure successful completion of the project (without applying to the technical assistance component).

Financial Assistance Program Requirements

In order to receive a financial assistance grant award, the applicant must submit the following documentation to demonstrate:

1. Permanent displacement as of July 30, 2016 by submitting a terminated lease, and any other documentation that clearly indicates that your lease was not renewed or you have received an offer for a lease renewal at substantially higher rates.
2. A minimum of five years of site control by submitting a fully executed letter of intent, lease, or purchase offer.
3. A high degree of project readiness by submitting identified funding sources for the project, a preliminary project budget and timeline, identified project management team (as applicable), and projected operating budget.
4. Demonstrate financial stability over the previous three consecutive years by submitting year-end financial statements or the most recent Data Arts report (formerly the California Cultural Data Project), and most recent tax year Form 990 (for 501(c)(3) organizations only), and most recent audit, if available.
5. Organizational capacity by submitting leadership resumes and/or biographies, and, if available, a strategic or business plan.
6. An established track record of serving the residents of the City of Oakland by providing at least three events or programs produced in Oakland over the past three years.
7. A track record of artistic and/or programmatic excellence and quality delivery of programs and/or services by submitting up to three recent press critiques/reviews—not previews—covering local work and attesting to the quality and rigor of your programs, and, if available, a letter of support from a community member, audience, artist served, or funder/donor that can speak to the artistic and programmatic excellence.

¹ “tenant improvements” are customized alterations made to the property for the specific needs of the tenant. These include walls, floors, ceilings, and lighting, among others. Tenant improvements tend to be fixed to the property and tenant cannot remove them when vacating the premises.

Restrictions on Grant Funds

- Only one financial assistance grant may be awarded per project for an applicant organization for the duration of this one-time pilot program.
- Financial assistance projects must take place within the grant window (ending spring 2018).
- Organizations that may be temporarily displaced, due to building renovations and have the right to return at their current/affordable lease rate are ineligible to apply.
- Grant funds may not be used for any of the following:
 - Ongoing mortgage payments
 - More than six months of a rental stipend (difference between prior and new rent amounts)
 - Staff salaries
 - Expenses due to temporary displacement
- Grant funds can only be used for the following eligible expenses:
 - Professional services (architectural, engineering, legal)
 - Rent stipend (up to six months of the difference between prior and new rent amounts)
 - Moving expenses
 - Holding costs
 - Tenant improvements²
 - Furnishings, fixtures, and equipment

² “tenant improvements” are customized alterations made to the property for the specific needs of the tenant. These include walls, floors, ceilings, lighting, among others. Tenant improvements tend to be fixed to the property and tenant cannot remove them when vacating the premises.

Evaluation and Selection Process

Applications are processed and reviewed initially by CAST staff. A Selection Committee will evaluate the applications and make final decisions on the technical and financial assistance awards. The selection committee will be comprised of experts in the arts, philanthropy, management, organizational development, facilities and construction management, financial management, and real estate development.

Technical assistance and financial assistance grant awards will be determined on a competitive basis and by the criteria listed below. Financial assistance awards will be granted based on available funds. The Selection Committee reserves the right to make exceptions to the maximum financial assistance grant award amount of \$75,000. We anticipate great demand for this limited pool of funding. Please consider carefully and be realistic in your request amount to this pilot program.

Evaluation Criteria for Technical Assistance & Financial Assistance

The Selection Committee will make final award decisions based on the core criteria below:

Space Project Readiness (25 points)

- Real Estate Readiness - Financial Assistance only
- Readiness to engage in Technical Assistance - Technical Assistance only

Financial Stability (20 points)

Organizational Capacity (20 points)

Financial Hardship (15 points) - Financial Assistance only

Displacement Risk (15 points)

Artistic Quality & Programming (15 points)

Community Impact (15 points)

Organizations meeting one or all priority criteria below can earn up to an additional 25 bonus points in their overall evaluation.

Cultural Equity (10 points) - Demonstrated accessibility in the creation, production, presentation, and patronage of arts and culture for all, including historically underserved communities (African, Latino(a), Asian, Arab, Native American, Pacific Islander, LGBTQ, People with Disabilities, and Women)

Cultural Preservation (10 points) - Demonstrated preservation of Oakland's tangible and intangible assets, including physical cultural assets and cultural heritage assets that have been integral to Oakland's communities and cultural legacies

Geographic Equity (5 points) - Demonstrated geographic location of space, programming, and/or audience in (and for) underserved neighborhoods and communities in Oakland that would benefit most from preservation/development of arts and cultural spaces and programs